

PROBATION OFFICER CORE TRAINING COURSE MANUAL

State of California, Board of Corrections

Standards and Training for Corrections Program

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1985, 1987, 1988, 1990, 1994, 1998

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INTRODUCTION

Purpose and Scope of This Manual

The primary purpose of this **Core Training Manual** is to present the core curriculum and design specifications for the Probation Officer Core Course. This information is essential for training providers for the presentation of the entry core course and to receive and maintain STC certification. It is also of significant benefit to local probation departments in the selection and training of new probation officers.

Note: This manual can be downloaded from the Board of Corrections web site:
www.bdcorr.ca.gov.

The manual also provides a brief summary of how the curriculum was revised, assumptions underlying the development and revision of the curriculum and how the course specifications may be used to prepare course lectures, lesson plans, tests and materials. For more in-depth coverage of certification procedures, structure and core course delivery requirements, training providers are encouraged to thoroughly read the Board's **Handbook for Presenting Core Courses**.

The **Core Training Manual** is divided into several sections. Section A provides a description of the probation officer job, an overview of the 1997-1998 curriculum revision process and the assumptions guiding the process.

Section B presents a summary of the results of 1997-1998 job re-analysis and curriculum revision.

Section C presents an overview of the revised Probation Officer Core Course in topical outline form. This outline shows the time to be spent on each module and unit and the sequence of the topics.

Section D presents the prescribed objectives for the course. These objectives are the heart and soul of the curriculum. They are the fundamental building blocks for further presentation development, the means by which the purpose of the course is communicated, the goals toward which trainees will strive and the basis for developing methods to evaluate instructional effectiveness.

Section E contains the Test by Performance Objective Index. This index identifies the performance objectives that are to be included in each job knowledge, written skills and behavior skills test in the course. The index also provides the minimum number of test questions to be included in the job knowledge tests.

Section F consists of the Objectives by Core Task Index. This index documents the relationship of each course objective to one or more important probation officer core tasks, defined as tasks important and commonly performed by the majority of probation officers statewide.

Section G presents the full list of probation officer core tasks. The core task statements will allow the reader to examine in detail the relationship between course objectives and the narrative statement of each validated core task.

A separate document entitled **Knowledge/Skill Maps** accompanies this **Core Training Manual**. The **Knowledge/Skill Maps** contain valuable resource documentation about the core tasks, arranged in a format that groups related core tasks. In addition to linking the knowledge/skill maps to the core tasks, each group of core tasks in the maps is described more fully in terms of the value, prerequisites and steps of performing the core tasks. This information will assist providers and instructors when they develop their lesson plans and test questions. A more complete explanation of how the maps relate to the course is contained in the introductory pages of the maps manual.

Effective Date for Delivery of This Curriculum

The effective date for the prescribed curriculum detailed in this manual is January 1, 1999. However, STC training providers may begin delivering this curriculum prior to the effective date if the revised curriculum has been certified by the Board of Corrections. Certification documents must be submitted to STC 60 days prior to the first delivery of this new curriculum.

All of the course objectives, testing methodologies and knowledge/skill maps were evaluated and revised. As a result, training providers must also update their presentations, lesson plans and job knowledge test items to reflect these changes. Please feel free to contact the Board of Corrections for any assistance needed in fulfilling these certification requirements.

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SECTION A. DESCRIPTION OF THE PROBATION OFFICER JOB

The probation officer job can differ from one county to another and from one assignment to another in the same county. This training course relates to the activities or tasks performed by the majority of probation officers throughout the state, regardless of the location, size, budget, etc. of the employing agency.

The description of this “core” job comes from two basic sources. First, the overall mission of the probation officer job and its place in the California Criminal Justice System are established in state law. The second source of data about the core job comes from the statewide job analysis research conducted periodically by the Standards and Training for Corrections Program of the California Board of Corrections.

Drawing upon each of these sources, the following describes the core job in terms of its: (a) overall mission, (b) role and function in the California Criminal Justice System, and, (c) major tasks and responsibilities.

Mission of the Probation Officer: The Probation Officer, under the direction of the Chief Probation Officer, provides for the protection of the community and its citizens by providing probation investigations, recommendations and reports for the courts, enforcing orders of the courts, and securing supervision and treatment for probationers who are under the jurisdiction of the courts and/or county probation departments.

Role and Function of the Probation Officer: The Probation Officer, as the agent of the Chief Probation Officer, fulfills a variety of responsibilities. These include:

Social Diagnostician: Prepares probation social studies and reports that identify and evaluate factors causing criminal or delinquent behavior and develops and recommends programs to eliminate or correct these factors.

Agent of Change: Acting as a broker of services, serves and involves the client with supportive agencies or persons to bring about change in the client’s behavior.

Peace Officer: As an officer of the courts, exercises those peace officer powers over clients which may be necessary for the protection of the community and resocialization of the client.

Major Tasks and Responsibilities: The major tasks and responsibilities of the probation officer job in the State of California have been defined in the statewide job analysis and re-analysis phases of the Standards Projects sponsored by the Standards and Training for Corrections (STC) Program (1982-85, 1987, 1989-90, 1993-94 and 1997-98). For the purposes of this manual, only the highlights of these studies are presented.

The primary data gathering instrument in the statewide job analysis is a structured task questionnaire completed by probation officer job incumbents and supervisors. The 1997-1998 job analysis was divided into two phases: the first phase was a questionnaire focusing on tasks which required primarily physical, vision and hearing abilities. The second phase targeted tasks that were more cognitive in nature.

The ratings from these questionnaires were used to identify the core tasks upon which this curriculum is built. For a more detailed report on the 1997-1998 job analysis, please refer to STC documents describing these studies.

All core tasks identified in the research are listed in this manual in Section G. Contained below is a summary of the content of the core job.

Juvenile Detention Decisions

- Reviewing charges, previous record.

- Notifying parents; interviewing, counseling and advising juvenile and parents of rights, informing of hearing date.
- Making recommendations and decisions for detention or release, filing of petition and/or seeking further action.

Adult or Juvenile Investigation (including probation violations)

- Interviewing juvenile/adult, codefendants, victims, and arresting officer about offense.
- Reviewing information about current offense.
- Reviewing past records, obtaining medical, psychiatric, employment, education and past treatment information from records and other sources.
- Contacting victim about court appearance rights and deadlines.
- Referring complaints of child abuse, elder abuse and domestic violence to proper authorities for assistance.

Making Recommendations for the Disposition of New Cases or Violation of Probation

- Evaluating seriousness of offense, aggravating or mitigating circumstances (based on investigation), and recommending sentence/disposition and/or conditions of probation.
- Recommending placement and making arrangements with facility.

Establishing Supervisory Relationships with New Probationers (Adult and Juvenile)

- Arranging and conducting initial/subsequent interview to assess probationer's needs and the risks posed to the community.
- Reviewing probationer's file, consulting with outside agencies to gain familiarity with the case.
- Establishing treatment plan, and reviewing terms and conditions with probationer and family.

Setting Up Collection of Restitution, Fines and Other Payments

- Obtaining and evaluating appropriateness of victim's restitution claims.
- Recommending amount due and repayment schedule based on probationer's ability to pay.

Monitoring Compliance of Adult/Juvenile with Terms and Conditions of Probation

- Interviewing probationer and others (parents, employers, etc.) to check on compliance with terms and conditions.
- Visiting residence, work place, placement.
- Corresponding with referral sources, monitoring restitution payments.
- Notifying victim as required by law when probationer is released from custody.
- Taking action due to lack of progress (arresting, requesting warrant, changing frequency of contact, initiating court process).
- Conducting searches and testing to determine probation compliance.
- Writing reports for violation of probation, request for supplemental action.
- Reviewing request to leave state or county.

Making Referrals to Providers of Medical, Mental Health, Social Service, Education, Employment and Other Services

- Determining and conveying relevant information and safety/security concerns (e.g., law violations, change of placement) about probationer to police, probation personnel, social services and other appropriate agencies.
- Assessing probationer needs and helping them access appropriate counseling services, answering questions.

- Providing crisis intervention counseling.

Preparing Court Reports and Other Related Documents

- Preparing pre-sentence, disposition or supplemental reports for courts.
- Preparing court documents for Judge's signature (e.g., arrest warrants, terms and conditions of probation, ex-parte orders).

Other Court Related Duties

- Reviewing case before court appearance.
- Testifying and answering questions in court, making recommendations and providing oral updates.
- Conducting investigations and studies ordered by the court.

Other Paperwork

- Writing or dictating correspondence, reports, taking notes, keeping records.
- Gathering and organizing information from files, proofreading, filing.

Providing Service to the Community

- Giving presentations, responding to questions from the public, schools, speaking with juveniles at parents' request.

Establishing and Maintaining Relationships with Referral and Placement Resources

- Developing and maintaining contacts with foster parents, potential employers, placement facilities, and social service agencies,

Other Required Duties

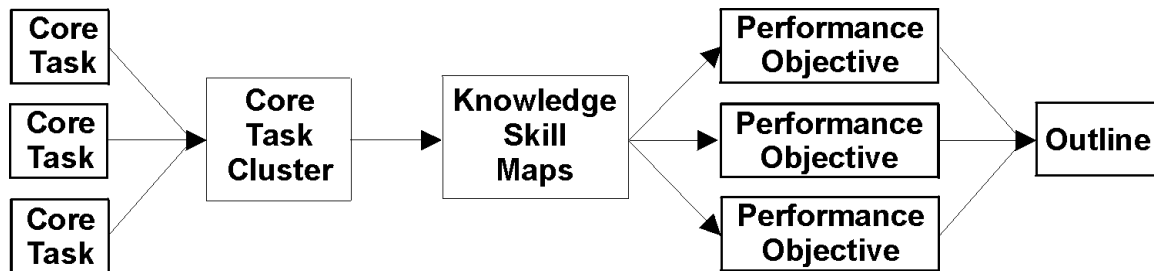
- Keeping informed about department via meetings, training courses, consultation with co-workers and supervisor.
- Representing probation department perspective in joint operations with other agencies.

OVERVIEW OF THE 1997-1998 REVISION PROCESS

The process of design for the core course is described below:

1. Core tasks applicable to the majority of probation officers statewide were identified through a job analysis.
2. Core tasks were grouped into related clusters of tasks.
3. The groups of core tasks were analyzed to determine what knowledge and skills are necessary to perform these groups of tasks. This analysis generates what is called a "knowledge/skill" map. Each map specifies the value, prerequisites, resources, principles and steps required to perform the group of tasks.
4. Course objectives were generated from the knowledge/skill maps.
5. Testing specifications were determined for each performance objective.
6. Course objectives were arranged into units and subunits (called modules) of instruction.
7. Units and subunits were arranged in a building block sequence.

The following graphic illustrates the course design process:



COURSE DESIGN INPUT

The 1997-1998 revision was conducted through a variety of means of input including surveys, focus groups and task force meetings with practitioners, trainers, providers, supervisors, training managers and subject matter experts who participated in the following phases of the process:

Phase I: Evaluation of the 1993-1994 curriculum

- Instructor focus group
- Trainee and supervisor survey
- Written course evaluations

Phase II. Job Re-Analysis

- Identification of core tasks
 - Physical Abilities
 - All Other Tasks
- Revision of Knowledge/Skill Maps

Phase III. Revision of Course Objectives and Testing Specifications

Phase IV. Development of New Course Outline

ASSUMPTIONS GUIDING DEVELOPMENT OF THE CORE COURSE

Training design involves a series of decisions, many of which are critical to producing an effective instructional program. For example, the designers must repeatedly make decisions regarding the inclusion or exclusion of specific content in the training course. While such decisions are often complex and difficult, they are much more easily made if some basic assumptions or parameters have been established for the project. The assumptions that guided the development of the Probation Officer Core Course are presented below.

Assumption #1: The content of the training course must be job related.

This assumption refers all decisions on training content, methods, and format back to the actual demands of the probation officer's job. To the extent that knowledge or skills are not essential to job performance, they are not included in the training course.

Assumption #2: The training course should specify the training needed by "entry-level" probation officers who have no prior training or experience in corrections.

This assumption identifies "entry-level" probation officers as the target audience for the core training course. The training needs of experienced probation officers are not covered by this course. Although some entry-level probation officers may have some background in corrections, the assumption of no prior training or experience ensures that the core training course will cover the needs of all entry-level personnel, even those with no background at all.

Assumption #3: The training course should specify only those knowledge and skills that are essential for the newly hired probation officer to meet minimum performance standards for entry-level personnel and to obtain maximum benefit from subsequent on-the-job training and experience.

It is very important to recognize that the core training course cannot and should not be expected to produce an experienced probation officer capable of handling every job assignment. The core training course provides the trainee with the basic concepts, tools, skills, etc. necessary to make sense of the job and to accelerate the learning process.

Assumption #4: Trainees will complete the entire core training course prior to their first actual work assignment.

Assumption #4 is derived from Assumptions #2 and #3. Since trainees are assumed to have no prior background in corrections, the core training course must be completed before trainees begin to accumulate experience on the job. Following from Assumption #3, trainees should complete the core training course prior to their first work assignment because this will allow them to most efficiently learn from their on-the-job experience and achieve proficiency as soon as possible.

Assumption #5: The core training course should be administratively feasible and efficient.

To enable every training course to operate within certain administrative constraints (e.g., time, budget, personnel, etc.), the course was designed with the following considerations:

- **Daily Schedule**

Daily course schedules are designed to be 8 hours per day, 5 days per training week.

- Testing Periods and Methods

The Job Knowledge Tests (paper and pencil, multiple choice tests) are designed to be scheduled in blocks at the beginning or at the end of a training day where possible. This will provide for the use of a test proctor to monitor this type of testing, rather than the instructor.

The multiple choice test format is the preferred testing methodology for measuring knowledge-based objectives because of its proven value in measuring many different types of learning and its low cost.

The performance tests (Written and Behavior Skills Tests) are to be administered by the designated instructor during the process of training delivery.

- Instructional Methods

The traditional classroom training model is the preferred training delivery format. This allows for a variety of delivery methods (lecture, class discussion, demonstration, and role playing) along with the use of supportive multi-media technology.

Where feasible, it is recommended that adult learning styles guide the delivery of this course and that trainee participation is encouraged where appropriate. For more information on course delivery methods, please refer to the **Handbook for Presenting Core Courses**, specifically the section on “Choosing Effective Training Delivery Methods.”

SECTION B. SUMMARY OF CHANGES TO THE CURRICULUM

The length of the course continues to be 174 hours. However, time frames and sequencing have been modified for several units and modules. Please refer to Sections C and D of this manual for a detailed comparison of specific changes.

Three new units were created either by adding new material or combining portions of the prior curriculum. The unit on *Officer Safety: Physical Skills Training* is entirely new. This unit addresses new core tasks identified in the 1996-1997 job analysis that identified physical skills necessary for the majority of probation officers statewide.

The performance objectives in the *Physical Skills Training* unit mirror some aspects of the performance objectives in 832 PC training. There are several reasons for this. First, many of the new probation officers taking the Probation Officer Core Course completed their 832 PC training when they were employed as juvenile hall counselors. In many cases, their initial training occurred several years earlier.

Second, the type of skills acquired in this type of training tend to fade quickly, especially if not used frequently. Therefore, the more they are reinforced and practiced, the more they are viable.

Third, the performance objectives in the Probation Officer Core Course are tailored specifically to probation officer job tasks. In contrast, the 832 PC training must be generic enough to cover a variety of peace officer positions. (There are over 80 job titles under the designation of peace officer.) Addressing the specific skills necessary for probation officers in the STC core course allows for a customized delivery more applicable to the duties of a probation officer.

This physical skills unit is preceded by another new unit: *Officer Safety: Foundations*. This unit emphasizes prevention, planning and safety as mechanisms that will reduce the need to employ physical skills. This *Foundations* unit also covers use of force issues.

A four hour unit on *CPR* also has been added. Additionally, a new module on *Legal Liability* has been added to the early sections of the course.

The unit on *Public Relations* (formerly Unit 17) was eliminated as a stand alone unit. The instructional objectives from that unit were incorporated into the modules dealing with confidentiality and communicating with other agencies.

The former 20 hour unit on *Juvenile Intake and Processing* has been divided to bring sharper focus to juvenile detention decisions, (now Unit 5: *Juvenile Detention Decisions*, 8 hours). The investigation and information gathering portions of the former unit have been incorporated into two revised units: *Case Information Gathering: Written Records* (8 hours) and *Case Information Gathering: Interviewing* (12 hours). To avoid redundancy, these units are now more generic in that they apply to both juvenile and adult information gathering processes.

The time allocations for *Court Reports* (both Adult and Juvenile) were increased to reflect the importance of this job function and in response to consistent trainee feedback that this material needed more time.

The former Unit 9: *Referrals*, was eliminated as a stand alone unit and structured as a module within Unit 10: *Establishing a Casework Relationship*.

The unit on *Providing Counseling and Assistance* (formerly Unit 14) was sequenced before the units on *Monitoring* and *Responding to Probationer Performance* to emphasize preventive efforts by the probation officer.

Former Unit 15, *Transport*, was eliminated as a separate unit and incorporated as a module in the new, related unit on *Officer Safety: Foundations*.

Case Management was eliminated as a separate unit and incorporated into the unit on *Responding to Probationer Performance*.

A new module, *Priority Setting for Probation Officer Functions*, was sequenced at the end of the course as a way to integrate newly acquired knowledge and skills from the training. The instructional objectives of this module may be addressed in a high impact exercise designed to pull the course together for a successful and upbeat ending.

The following structural changes were also made to the course:

- The total number of instructional objectives was reduced from 250 to 226. Fifty-nine of the objectives from the 1994 version were either deleted outright (because they addressed a task no longer performed by the majority of probation officers) or merged into other objectives. Thirty-five new objectives were developed to address changes to the probation officer job as identified in the most recent job task analysis.
- The percentage designation for instructional objectives was eliminated. Previously, each objective was assigned a percentage value to indicate the relative emphasis of the objective within the module. This designation was dropped to avoid possible misinterpretation that the percentage corresponds with time allocation.

Instead, instructors are encouraged to rely on the knowledge/skill maps when developing their presentations. For example, the knowledge/skill maps, specifically the “value” section, identify the negative consequences for failure to perform tasks related to the objective. This information is a rich source for instructors to develop their lesson plans and to highlight the most important aspect of the module.

- The Instructional Objective by Task Index (Section F) was revised. This index links each objective to the underlying core tasks. The revisions identify only the core tasks most germane to the objective. (Please note that some core tasks are not addressed in training at all. The skills, knowledge and abilities required to perform these tasks are considered to be pre-hire requirements, e.g., the ability to read, drive a car, etc.)
- The total number of Job Knowledge Tests was reduced from 52 to 12.
- The total number of Job Knowledge Test questions was reduced from 600 to 360.
- The total number of Written Skills Tests was reduced from 40 to 27.
- The total number of Behavior Skills Tests was increased from 11 to 22.
- Several trainee behavior descriptions (verbs) called for in the instructional objectives were modified to guide instructors toward adult learning methodologies that encourage trainee participation. For example, the verb “identify” in several of the objectives was changed to a verb such as “explain”, “describe”, “discuss”, “compare”, etc. Please note that most of these performance objectives continue to require testing.

The Board of Corrections is hopeful that these changes will not only update the curriculum, but also make it more efficient and convenient for training providers, instructors and local agencies.

SECTION C: CORE TRAINING COURSE OUTLINE AND UNIT SCHEDULE

This section presents an outline, by units and modules, of the Probation Officer Training Course. The units and modules are hierarchically sequenced because each curriculum subject is generally dependent on the subject matter that precedes it. This is conducive to the trainee's learning experience. The minimum instructional time frames are noted for each unit and module including the time necessary for administration of the Job Knowledge Tests. The training must be delivered in the order presented below with the exception of Unit 14 (see Section D).

Course Outline

UNIT 1 AGENCY SPECIFIC TRAINING INTERVENTIONS

UNIT 2 CALIFORNIA CRIMINAL JUSTICE SYSTEM ORIENTATION (16 hours)

- Module 2.1 Roles and Responsibilities of the Probation Officer (4 hours)
- Module 2.2 Ethics and the Probation Officer (1.5 hours)
- Module 2.3 Legal Terminology (3 hours)
- Module 2.4 Legal Foundations for Probation (1 hour)
- Module 2.5 Reference Use of the Codes, Statutes, and Judicial Council Rules (2 hours)
- Module 2.6 Historical Milestones and Current Trends (1 hour)
- Module 2.7 Adult Criminal Justice System and Process (1 hour)
- Module 2.8 Juvenile Justice System and Process (1 hour)
- Module 2.9 Legal Liability (1.5 hours)

UNIT 3 CONFIDENTIALITY AND RELEASE OF INFORMATION (3 hours)

- Module 3.1 Codes, Statutes, and Case Law Relating to
Confidentiality and Release of Information (3 hours)

UNIT 4 IDENTIFYING PROBLEMS AND PREDICTORS (16 hours)

- Module 4.1 Indicators of Psychological Problems (3 hours)
- Module 4.2 Indicators of Substance Abuse (4 hours)
- Module 4.3 Indicators of Family Violence (5 hours)
- Module 4.4 Indicators of Gang Affiliation (4 hours)

UNIT 5 JUVENILE DETENTION DECISIONS (8 Hours)

- Module 5.1 Legal Obligations and Decision-Making (8 hours)

UNIT 6 CASE INFORMATION GATHERING: WRITTEN RECORDS (8 Hours)

- Module 6.1 Case Information Gathering: Written Records (8 hours)

UNIT 7 CASE INFORMATION GATHERING: INTERVIEWING (12 Hours)

- Module 7.1 Investigation Interviewing (10 hours)
- Module 7.2 Victim Interviews (2 hours)

UNIT 8 (4 Hours)	RESTITUTION, FINES AND OTHER PAYMENTS
Module 8.1	Legal Foundations and Terminology (4 hours)
UNIT 9 (31 Hours)	COURT REPORTS AND PRESENTATIONS
Module 9.1	Court Reports (3 hours)
Module 9.2	Presentations to the Court and Testifying (2 hours)
Module 9.3	Dispositional Alternatives in Juvenile Cases (4 hours)
Module 9.4	Writing a Report to the Juvenile Court (8 hours)
Module 9.5	Determinate Sentencing (4 hours)
Module 9.6	Dispositional Alternatives in Adult Cases (2 hours)
Module 9.7	Writing a Report to the Adult Court (8 hours)
UNIT 10 (14 Hours)	ESTABLISHING A CASEWORK RELATIONSHIP
Module 10.1	Reviewing Court Orders and Preparing for the Orientation Meeting with the Probationer (1 hour)
Module 10.2	Conducting the Orientation Meeting and Interview with the Probationer (8 hours)
Module 10.3	Establishing Case Goals and Plans (3 hours)
Module 10.4	Factors in Making Referrals (2 hours)
UNIT 11 (8 Hours)	PROVIDING COUNSELING AND ASSISTANCE
Module 11.1	Responding to Probationer Questions and Requests (3 hours)
Module 11.2	Interstate Compact and Out of County Jurisdictional Issues (1 hour)
Module 11.3	Problem Assessment (2 hours)
Module 11.4	Crisis Intervention Counseling (2 hours)
UNIT 12 (12 Hours)	MONITORING PROBATIONER PERFORMANCE
Module 12.1	Personal Contacts with Probationers (2 hours)
Module 12.2	Other Sources of Information (1.5 hours)
Module 12.3	Communications with Other Agencies about the Probationer (30 minutes)
Module 12.4	Contraband, Evidence and Legal Principles of Searches (8 hours)
UNIT 13 (12 Hours)	OFFICER SAFETY: FOUNDATIONS
Module 13.1	Personal Safety Precautions (4 hours)
Module 13.2	Searching Buildings and Vehicles (3 hours)
Module 13.3	Preparation for Transport (1 hour)
Module 13.4	Principles of Use of Force (3 hours)
Module 13.5	Principles of Use of Restraints (1 hour)
Unit 14 (16 Hours)	OFFICER SAFETY: PHYSICAL SKILLS TRAINING
Module 14.1	Evasive and Blocking Techniques (2 hours)
Module 14.2	Handcuffing (2 hours)
Module 14.3	Arrest and Control Techniques (4 hours)
Module 14.4	Searching the Person (4 hours)
Module 14.5	Two Officer Arrest and Control Techniques (2 hours)
Module 14.6	Physical Skills Testing and Review (2 hours)

UNIT 15 RESPONDING TO PROBATIONER PERFORMANCE
(7 Hours)

Module 15.1 Violations of Probation or New Law Violations (4 hours)
Module 15.2 Modifications of Case Plan (1.5 hours)
Module 15.3 Priority Setting for Probation Officer Functions (1.5 hours)

UNIT 16 CPR
(4 Hours)

JOB KNOWLEDGE TESTING
(3 Hours)

PROBATION OFFICER CORE COURSE MINIMUM TIME ALLOCATION AND TEST SPECIFICATIONS					
Unit	Minimum #Hrs	Job Knowledge Tests	Written Skills Test	Behavior Skills Test	
2	16	1			
3	3	1			
4	16	2	1, 2, 3	1	
5	8	3	4, 5, 6, 7		
6	8	4			
7	12	5	8	2, 3, 4	
8	4	6			
9	31	7	9, 10, 11		
10	14	8	12, 13, 14, 15	5	
11	8	9	16, 17, 18	6	
12	12	10	19, 20		
13	12	11	21, 22, 23	7, 8	
14	16	11		8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22	
15	7	12	24, 25, 26, 27		
16	4				
Total Hours	171	+3	No Additional Hours	No Additional Hours	=174

SAMPLE OF COURSE OUTLINE

The following is a sample of how the course may be structured. This example illustrates the way a provider may prepare the Request for Certification (RFC). The example below (days 11-20) focuses on how Unit 14 may be sequenced with the other units.

DAY	HOURS	SUBJECT	MODULE
11 (8 hrs.)	0800 - noon	Determinate Sentencing	9.5
	1300 - 1500	Dispositional Alternatives	9.6
	1500 - 1700	Writing a Report to the Adult Court	9.7
12 (8 hrs.)	0800 - noon	Personal Safety Precautions	13.1
	1300 - 1500	Evasive and Blocking Techniques	14.1
	1500 - 1700	Handcuffing	14.2
13 (8 hrs.)	0800 - noon	Writing a Report to the Adult Court, continued	9.7
	1300 - 1500	Writing a Report to the Adult Court, continued	9.7
	1500 - 1600	Reviewing Court Orders	10.1
	1600 - 1700	Conducting the Orientation Meeting	10.2
14 (8 hrs.)	0800 - 1100	Searching Buildings and Vehicles	13.2
	1100 - noon	Preparation for Transport	13.3
	1300 - 1700	Arrest and Control Techniques	14.3
15 (8 hrs.)	0800 - noon	Conducting the Orientation Meeting, continued	10.2
	1300 - 1600	Conducting the Orientation Meeting, continued	10.2
	1600 - 1700	JKT # 4, 5, 6, 7	
16 (8 hrs.)	0800 - 1100	Establishing Case Goals and Plans	10.3
	1100 - noon	Factors in Making Referrals	10.4
	1300 - 1400	Factors in Making Referrals, continued	10.4
	1400 - 1700	Responding to Probationer Questions and Requests	11.1

DAY	HOURS	SUBJECT	MODULE
17 (8 hrs)	0800 - 1100	Principles of Use of Force	13.4
	1100 - noon	Principles of Use of Restraints	13.5
	1300 - 1700	Searching the Person	14.4
18 (8 hrs.)	0800 - 1700	Contraband, Evidence and Legal Principles of Searches	12.4
19 (8 hrs.)	0800 - noon	Violations of Probation or New Law Violations	15.1
	1300 - 1500	Two Officer Arrest and Control Techniques	14.5
	1500 - 1700	Physical Skills Testing	14.6
20 (8 hrs)	0800 - 0900	Interstate Compact	11.2
	0900 - 1100	Problem Assessment	11.3
	1100 - noon	Crisis Intervention Counseling	11.4
	1300 - 1400	Crisis Intervention Counseling, continued	11.4
	1400 - 1530	Modifications of Case Plan	15.2
	1530 - 1700	Priority Setting for Probation Officer Functions	15.3

SECTION D. INSTRUCTIONAL OBJECTIVES AND DESIGN SPECIFICATIONS

In this section, the instructional objectives are presented for each course module that makes up a unit of instruction. To provide further support to the training provider, the objectives have been placed in an appropriate hierarchical learning sequence, typically in order of recalling information then applying it. The units of instruction should be taught in the numerical order in which they appear in this manual.

The Instructional Objectives are written as a measurable statement that describes an expected learning outcome to be achieved and demonstrated by a trainee upon completion of the core training course.

The instructional time assigned to the Units and Modules are presented in “dedicated” time frames. The instructional time is the minimum amount of time for the subject’s presentation. Training providers are encouraged to exceed these minimums and may request approval for certification of these increased time allocations.

A minimum number of test items is noted for each objective that is to be measured by a Job Knowledge Test. The allocation of time for the administration of these paper and pencil tests is in addition to the required delivery time for the performance objective, (usually a half minute per test question). These tests should not be confused with the Written Skills Tests (WST) and the Behavior Skills Tests (BST). These latter “performance” tests occur as part of the instructor’s presentation.

Unit 1.0
Agency Specific Training

This unit can be used by the agency or provider for the presentation of subject matter that meets a specific need of the target trainees, e.g., Orientation, Curriculum Overview and Trainee Expectations and Responsibilities in Core Courses, Consent Decree Issues, or PC 832. The provider will need to develop measurable performance objectives to secure STC approval and certification for this subject matter. This unit would be in addition to the required minimum 174 hours prescribed in the Probation Officer Core Course. The provider has the flexibility to present this unit prior to, at the end of, or within the prescribed Core Course, dependent upon approval of the rationale presented by the provider or the user agency.

Unit 2.0
CALIFORNIA CRIMINAL JUSTICE SYSTEM ORIENTATION
Unit Instructional Time: 16 hours

MODULE 2.1: ROLES AND RESPONSIBILITIES OF THE PROBATION OFFICER
Instructional Time: 4 hours

OBJECTIVES:

2.1.1. Identify the characteristics of the profession of probation officer.

- Sharing of a common set of principles and goals
- Achieving a recognized body of knowledge pertaining to the correctional employee
- Belonging to one or more organizations that promote the interests of the profession
- Subscribing to a code of ethics that regulates the interests of the profession

JKT # 1/ 2 Items

2.1.2. Identify the roles, function and mission of the probation officer.

- Social diagnostician
- Agent of change
- Peace Officer

JKT # 1/ 2 Items

2.1.3. Identify the major roles and responsibilities of the probation officer in relationship to the following constituencies:

- State of California
- County Board of Supervisors
- County Judicial System
- Community/Public Relations
- Probationers
- Other Probation Personnel
- Other Agencies in the Criminal Justice System

JKT # 1/ 4 Items

2.1.4 Identify the roles and relationships of the probation officer to the following components in the Administration of Justice System:

- Legislature
- County Board of Supervisors
- Court Systems (e.g., superior, municipal, appellate)
- Court Clerk
- District Attorney
- Defense Attorneys
- Police and Sheriff's Department
- Department of Corrections
- Community Agencies
- Judge, Referee, Commissioner, Pro Tem, etc.
- Juvenile Court
- Juvenile Justice Commission

- Delinquency Prevention Commission
- California Youth Authority
- Parents
- Juvenile Hall/Juvenile institutions
- Community agencies

JKT # 1/ 4 Items

MODULE 2.2: ETHICS AND THE PROBATION OFFICER

Instructional Time: 1hour 30 minutes

OBJECTIVES:

2.2.1. Explain why probation officers, on and off duty, should exemplify the highest ethical and moral standards to:

- Promote professionalism
- Gain public support for the profession
- Earn the respect and confidence of peers
- Maintain a sense of self worth and pride

JKT # 1/ 1 Item

2.2.2. Describe the best methods for handling unethical situations using the following principles:

- Expressing verbal disapproval of minor infractions of coworkers
- Discussing continued infractions with a supervisor
- Reporting misconduct to a supervisor
- Preventing criminal behavior, if possible, and reporting it to a supervisor immediately

JKT # 1/ 1 Item

2.2.3. Examine the problems associated when a probation officer violates the law:

- Incurs public disrespect for the law and the corrections profession
- Provides mixed messages to the public as to the meaning and the applications of law to all

JKT # 1/ 1 Item

2.2.4. Explain why it is necessary to take positive action when becoming aware of unethical and/or criminal conduct of other probation officers or correctional professionals to:

- Maintain public trust
- Prevent further misconduct
- Permit corrective action to take place

JKT # 1/ 1 Item

MODULE 2.3: LEGAL TERMINOLOGY
Instructional Time: 3 hours

OBJECTIVES:

2.3.1. Define and generate examples of the following terms using the codes and Judicial Council Rules for reference:

- Allegation/Charge
- Petition/Complaint
- Minor/Defendant
- Preliminary Hearing
- Civil Compromise
- Plea, Negotiated Plea
- Finding/Conviction
- Disposition/Sentence
- Enhancement
- Sentence Range/Confinement Time
- Concurrent Sentences
- Consecutive Sentences
- Aggravating/Mitigating Circumstances
- Warrant
- Time Credits
- Jurisdictional Hearing
- Indictment
- Base Term
- Information
- Sustain (petition)
- Adjudication
- Ward/Wardship
- Custody
- Grant (of Probation)
- Imposition of sentence (suspended)
- Execution of sentence (suspended)
- Terms and conditions
- Certification (of juvenile to juvenile court)
- Remand (of juvenile to adult court)
- New, supplemental, subsequent, and modification (petitions)
- Placement
- Commitment
- Peace officer
- Dismissal
- Termination
- Felony
- Misdemeanor
- Infraction
- "Wobbler"
- Fitness Hearing

JKT # 1/ 10 Items

MODULE 2.4: LEGAL FOUNDATIONS FOR PROBATION

Instructional Time: 1 hour

OBJECTIVES:

- 2.4.1. Identify the primary purpose and scope of application of each major legal reference or source that impacts the work of a probation officer. For example:

- Codes
- Statutes
- Judicial Council Rules (i.e., Criminal and Juvenile Court Rules)
- Relevant Case Law

JKT # 1/ 2 Items

MODULE 2.5: REFERENCE USE OF THE CODES, STATUTES, AND JUDICIAL COUNCIL RULES

Instructional Time: 2 hours

OBJECTIVES:

- 2.5.1. Given a reference to a specific section or topic in the Judicial Council Rules, demonstrate the procedure for accessing that section or information on that topic.

JKT # 1/ 1 Item

- 2.5.2. Given a reference to a specific code section or topic, demonstrate the procedure for accessing that section or information on that topic. Codes to be covered include:

- Welfare and Institutions Code
- Penal Code
- Health and Safety Code
- Vehicle Code
- Business and Professions Code

JKT # 1/ 2 Items

- 2.5.3. Given a specific code violation, identify the elements, classification, and penalties of that violation using the relevant code for reference.

JKT # 1/ 1 Item

MODULE 2.6: HISTORICAL MILESTONES AND CURRENT TRENDS

Instructional Time: 1 hour

OBJECTIVES:

- 2.6.1. Review the major historical milestones in the development of adult and juvenile justice systems in the United States and in the State of California.

No test

- 2.6.2. Examine the major current trends in the adult criminal and juvenile justice systems in the United States and in the State of California

No test

MODULE 2.7: ADULT CRIMINAL JUSTICE SYSTEM AND PROCESS

Instructional Time: 1 hour

OBJECTIVES:

2.7.1. Name the major steps in the adult criminal justice system from arrest to sentencing.

JKT # 1/ 2 Items

2.7.2. Describe the process by which pleas are negotiated and entered.

JKT # 1/ 1 Item

2.7.3. Identify the major types of dispositions in adult cases.

JKT # 1/ 1 Item

MODULE 2.8: JUVENILE JUSTICE SYSTEM AND PROCESS

Instructional Time: 1 hour

OBJECTIVES:

2.8.1. Name the major steps in the juvenile justice system from custody to disposition.

JKT # 1/ 2 Items

2.8.2. Identify the major categories of minors in the juvenile justice system. These include:

- Dependents (WIC 300)
- Status Offenders (WIC 601)
- Delinquents (WIC 602)

JKT # 1/ 4 Items

2.8.3. Identify the major types of dispositions in juvenile cases.

JKT # 1/ 1 Item

MODULE 2.9: LEGAL LIABILITY

Instructional Time: 1hour 30 minutes

OBJECTIVES:

Note: This section is intended to be overview only. Topics in this overview are covered in more detail in other sections of the course.

2.9.1. Identify elements of civil liability law as they relate to the probation officer, including:

- Ministerial duties
- Discretionary duties
- Actionable claims

JKT # 1/ 4 Items

2.9.2. Recognize issues pertaining to the job responsibilities of a probation officer where personal and departmental liability may arise for a lack of attendance to those responsibilities, using issues relating to:

- Probationer's offense and the officer's possible obligation to notify others (e.g., employer, school officials, etc.)
- Victim's rights
- Duty to Warn
- Family violence offenders and threats to other family members

JKT # 1/ 1 Item

UNIT 3.0
CONFIDENTIALITY AND RELEASE OF INFORMATION
Unit Instructional Time: 3 hours

MODULE 3.1: CODES, STATUTES, AND CASE LAW RELATING TO CONFIDENTIALITY AND RELEASE OF INFORMATION
Instructional Time: 3 hours

OBJECTIVES:

3.1.1. Given the sources of legal information on confidentiality listed below, describe procedure for accessing confidential information.

- State mandates in Penal and W&I Codes regarding destruction of public records
- CORI
- WIC 389, 781, 826,
- PC 1203.05
- TNG
- Department of Justice information sources

JKT # 1/ 2 Items

3.1.2. Using the following referenced sources, select information from an adult or juvenile case that could be given to persons, agencies, and organizations and why:

- CORI
- WIC 389, 781, 827, 828,
- PC 1203.05, 1203.10
- TNG
- Department policy regarding release of information to the media and attorneys (responding to Duces Tecum subpoena)
- Duty to warn

JKT # 1/ 3 Items

3.1.3. Describe the procedures for making inquiry into law enforcement information systems and cross referencing the information obtained within these systems for:

- Wants and Warrants
- Stolen property (including vehicles and firearms)
- Criminal histories
- DMV information
- Other

JKT # 1/ 1 Item

3.1.4. Identify the statewide information systems directly accessible to California criminal justice agencies, including CLETS, CJIS, NLETS and NCIC.

JKT # 1/ 1 Item

3.1.5. Identify the state laws and policies pertaining to verifying and disseminating telecommunication information including:

- Restricted information

- Unrestricted information

JKT # 1/ 2 Items

3.1.6. Explain the possible consequences of failing to maintain confidentiality or improperly releasing information about a case. For example:

- Criminal sanctions
- Lawsuits
- Departmental discipline
- Harm to probationer
- Dismissal of case

JKT # 1/ 4 Items

3.1.7. Identify the time frame an adult court report is available to the public.

JKT # 1/ 1 Item

3.1.8. Explain the procedures and limits of authority established by “release of information” forms.

JKT # 1/ 1 Item

UNIT 4.0
IDENTIFYING PROBLEMS AND PREDICATORS
Unit Instructional Time: 16 hours

MODULE 4.1: INDICATORS OF PSYCHOLOGICAL PROBLEMS

Instructional Time: 3 hours

OBJECTIVES:

- 4.1.1. Presented with a simulated interview or interaction between a client and a probation officer, generate a written description of the client's behavior and appearance.

WST # 1

- 4.1.2. Given a list of behavioral symptoms, identify those that indicate the need for further evaluation.

JKT # 2/ 2 Items

MODULE 4.2: INDICATORS OF SUBSTANCE ABUSE

Instructional Time: 4 hours

OBJECTIVES:

- 4.2.1. Given a class of substance abuse, identify behaviors likely to be displayed by the abuser.

JKT # 2/ 4 Items

- 4.2.2. Given verbal or visual descriptions of a client's behavior and appearance, generate an opinion regarding the likelihood of substance abuse and the class of drug involved.

JKT # 2/ 3 Items

- 4.2.3. Generate a list of appropriate questions to ask in order to discriminate physical and/or psychological problems from those related to drug abuse.

WST # 2

MODULE 4.3: INDICATORS OF FAMILY VIOLENCE

Instructional Time: 5 hours

OBJECTIVES:

- 4.3.1. Given a list of symptoms and behaviors, identify those that might be indicative of child abuse.

JKT # 2/ 4 Items

- 4.3.2. Given the legal obligations of the probation officer to report potential child abuse cases, generate a child abuse report using the Penal Code for reference and an abuse reporting form.

WST # 3

- 4.3.3. Given a list of symptoms and behaviors, identify those that might be indicative of elder abuse.

JKT # 2/ 2 Items

- 4.3.4. Identify the legal obligations of the probation officer to report potential elder abuse cases, using the Penal Code for reference.

JKT # 2/ 1 Item

- 4.3.5. Given a list of symptoms and behaviors, identify those that might be indicative of spousal/domestic partner abuse.

JKT # 2/ 4 Items

- 4.3.6. Describe procedures for referring victims of family violence to civil remedies (e.g., civil restraining orders).

JKT # 2/ 1 Item

- 4.3.7. Identify resources for aiding victims of family violence (e.g., child, elder, spousal abuse).

JKT # 2/ 2 Items

MODULE 4.4: INDICATORS OF GANG AFFILIATION

Instructional Time: 4 hours

OBJECTIVES:

- 4.4.1. Identify those signs, symbols, emblems and/or graffiti that indicate gang affiliation or associations.

JKT # 2/ 3 Items

- 4.4.2. Explain processes that gangs or other subcultures use in the recruitment of members and control of the behavior of others, e.g., why individuals join gangs.

JKT # 2/ 3 Items

- 4.4.3. Describe the relationship between local gangs with other similar groups in California.

JKT # 2/ 3 Items

- 4.4.4. Demonstrate techniques for interviewing gang members.

BST # 1

UNIT 5.0
JUVENILE DETENTION DECISIONS
Unit Instructional Time: 8 hours

MODULE 5.1: LEGAL OBLIGATIONS AND DECISION-MAKING

Instructional Time: 8 hours

OBJECTIVES:

5.1.1. Identify the key factors which must be considered in the decision to detain or release, including:

- Nature/seriousness of offense
- Home stability and support
- Pattern of offenses
- Community reaction to the offense
- Relationship to victim
- Juvenile's physical and psychological vulnerability
- History of dependency
- Prior failures to appear and other violations of court orders
- Juvenile Court Rules and department policy
- Sufficiency of evidence given the charge
- DA's filing policy
- Satisfaction of WIC 628 criteria
- Prior record

JKT # 3/ 3 Items

5.1.2. Explain the role of law enforcement and probation when a minor is taken into custody using the Welfare and Institutions Code for reference (e.g., WIC Sections 625, 626, 627 and 627.5).

JKT # 3/ 4 Items

5.1.3. Explain the consequences of a poor decision to detain or release a juvenile.

JKT # 3/ 1 Item

5.1.4. Given a sample case description, classify the case as a violation of WIC Section 300, 601, or 602 using the Welfare and Institutions Code for reference.

JKT # 3/ 2 Items

5.1.5. Name the primary sources of information used during juvenile detention decision making. For example:

- Interview with juvenile
- Juvenile Hall log and/or staff
- Probation files
- Current and prior arrest record
- Parent or other significant adult
- Police or sheriff's report
- Victim
- Other agencies that may have an interest (e.g., wants, warrants, etc.)

JKT # 3/ 2 Items

- 5.1.6. Given a sample police report on a juvenile taken into custody under WIC Section 602, generate detention limits and filing deadlines for the case.

JKT # 3/ 2 Items

- 5.1.7. Given a sample police report on a juvenile taken into custody under WIC Section 602, generate a list of key facts on the case.

WST # 4

- 5.1.8. Describe the process by which a juvenile's arrest record is obtained.

JKT # 3/ 1 Item

- 5.1.9. Identify the key information to obtain from the juvenile's prior arrest record. For example:

- Number and types of crimes (patterns)
- Date of offense(s)
- Description of offense
- Location of offense
- Case description
- Names of companions and victims
- History of violent crime
- History of substance abuse
- Disposition/sentence

JKT # 3/ 2 Items

- 5.1.10. Identify the key points of information to be obtained during a detention interview with a juvenile. For example:

- Juvenile's description of the offense
- Juvenile's description of his/her behavior and adjustment in key environments
- Juvenile's view of problem causes and ways to resolve
- Motivation for the offense
- Juvenile's gang and/or peer affiliation
- History of family violence

JKT # 3/ 3 Items

- 5.1.11. Given a partially completed case file including the police report, prior case notes, and other written records, generate a list of interview questions to ask the juvenile.

WST # 5

- 5.1.12. Given a sample police report on a juvenile taken into custody under WIC Section 602, generate a list of appropriate additional questions or points of information to cover with the juvenile, his/her parents, etc.

WST # 6

- 5.1.13. Given a completed case file on a juvenile taken into custody, generate a written opinion regarding the degree to which the case facts fit detention or release requirements using the WIC (e.g. 628), the Juvenile Court Rules, and a sample departmental policy for reference.

WST # 7

- 5.1.14. Given a sample juvenile case description, classify the case as a:

- Required referral for probable cause review
- Required referral to the district attorney
- Discretionary referral to the district attorney
- Case in which the probation officer may file a petition directly

JKT # 3/ 2 Items

- 5.1.15. Examine a complete case file on a juvenile, and formulate a decision to refer case to DA for a petition, handle informally, or counsel and release with a justification for that decision using the relevant codes, Juvenile Court Rules, sample department policy manual.

JKT # 3/ 1 Item

UNIT 6.0
CASE INFORMATION GATHERING: WRITTEN RECORDS
Instructional Time: 8 hours

MODULE 6.1: CASE INFORMATION GATHERING: WRITTEN RECORDS
Instructional Time: 8 hours

OBJECTIVES:

6.1.1. Identify the types of written records used in investigating an adult or juvenile case. For example:

- Court referral form
- Police report
- Crime lab report
- Copy of the complaint or grand jury indictment/petition
- DA's notes
- Medical and psychiatric reports
- Court order
- Court transcripts
- Probation file
- State/federal "rap sheets"
- Copies of juvenile arrest records
- DMV printout
- Jail/custodial records

JKT # 4/ 3 Items

6.1.2. Identify the typical time it takes to obtain each of the major types of records that must be obtained to process a case.

JKT # 4/ 1 Item

6.1.3. Identify the key information to obtain, and its uses, from probation files on a juvenile and adult. For example:

- Patterns of behavior/offense
- Family history, demographics
- Special problems
- School records
- Previous court orders, other contact with department
- Response to supervision
- Health history
- Evaluative and diagnostic comments by prior probation officer
- Prior statements by adult, minor and parent
- Gang and/or peer affiliation

JKT # 4/ 4 Items

6.1.4. Identify the key information obtained from the Juvenile Hall log and/or staff, and its uses, including:

- Juvenile's physical, medical and/or psychological condition at the time of booking
- Relationship to peers and staff
- Attitude

- Signs of substance abuse
- Parental or significant adult visits
- Progress in Juvenile Hall School
- Juvenile's statements re: offense
- Adjustment to pre-detention location
- Classification status

JKT # 4/ 4 Items

6.1.5. Given a completed sample Court Referral Form/Order, extract the following information:

- Plea or conviction/adjudication
- Date of plea or conviction/adjudication
- Sentencing date/disposition date
- Court of conviction/adjudication and court of sentencing/disposition
- Booking number if offender is in custody

JKT # 4/ 1 Item

6.1.6. Identify the filing deadlines for pre-plea, disposition reports and pre-sentence investigation reports.

JKT # 4/ 2 Items

6.1.7. Explain the potential consequences of failure to meet filing and court appearance deadlines.

JKT # 4/ 1 Item

6.1.8. Given a sample police report, examine the following information:

- Arrest and offense dates
- Description of the offense
- Victim's injuries and/or losses
- Co-offender
- Attitude of defendant/minor
- Statement of defendant/minor as relevant
- Circumstances surrounding the offense

JKT # 4/ 1 Item

6.1.9. Given a sample lab report, examine the following information:

- Details regarding evidence
- Drug cases: kind and quantity of drug
- Blood alcohol levels

JKT # 4/ 1 Item

6.1.10. Given a sample complaint, petition, or information, discuss the significance of the following information:

- Level of crime (i.e., felony, misdemeanor, infraction)
- Original vs. amended charge/allegation
- Pled/proven prior convictions

- Overt acts involved in conspiracy
- Degree of offense (1st, 2nd)
- Weapons, force, and fear allegations
- Date of offense
- Enhancements, special allegations, probation disqualifications

JKT # 4/ 6 Items

6.1.11. Obtain relevant information from a sample DA's file including the reasons for plea (if applicable).

JKT # 4/ 1 Item

6.1.12. Given a medical and/or psychiatric report, discuss the following information:

- Diagnosis
- Treatment recommended, including medication
- Prognosis

JKT # 4/ 1 Item

6.1.13. Given a sample probation report, extract the following key information:

- Adult or juvenile's statement in case
- Social history (family, school, etc.)
- Previous recommendation
- School, medical, employment, and mental health

JKT # 4/ 1 Item

6.1.14. Identify the uses of information from the CII/FBI rap sheet for the probation officer.

JKT # 4/ 1 Item

6.1.15. Discuss types of information not found on the CII/FBI rap sheet and identify strategies for filling in the gaps.

JKT # 4/ 1 Item

6.1.16. Given a sample CII/FBI rap sheet on an adult or juvenile arrest record, extract the following information:

- Prior charges
- Location and date of arrests
- By whom arrested
- Disposition of case

JKT # 4/ 1 Item

6.1.17. Given a sample DMV printout, examine and interpret the following information:

- Substance or alcohol abuse while driving (DUI)
- Vehicle code citations and arrests, particularly number, date, reason, disposition, compliance with court order
- Failures to appear or pay fines
- Possible false DOB, address

- License status

JKT # 4/ 1 Item

6.1.18. Explain how the probation officer might apply the information from the DMV printout. For example:

- Outstanding warrants indicate poor probation candidate
- Location of citations can be used to determine probationer's whereabouts
- May demonstrate patterns or history of bad driving behavior

JKT # 4/ 1 Item

UNIT 7.0
CASE INFORMATION GATHERING: INTERVIEWING
Instructional Time: 12 hours

MODULE 7.1: INVESTIGATION INTERVIEWING

Instructional Time: 10 hours

OBJECTIVES:

7.1.1. Identify key information to be gathered in an investigation/dispositional interview with an adult or with a juvenile offender, including:

- Individual's description of the current offense
- Individual's reaction to facts of case as obtained from other sources
- Inconsistencies between individuals and other accounts of the facts of the case
- Predictors of risk and need
- Current and prior arrests
- Motivation for the offense
- Information on co-offenders
- Individual's statement on his/her medical history
- Psychological history
- His/her description of his/her behavior and adjustment in key environments
- Short range goals or desires re: disposition/sentencing
- Previous residences
- Employment history
- School attendance
- Relationship with family
- Relationship between parents
- Attitude toward victim

JKT # 5/ 6 Items

7.1.2. In a simulated interview, demonstrate the use of leading questions, follow up questions, and active listening techniques.

BST # 2

7.1.3. Explain the benefit of a risk/need assessment when developing a pre-sentence and/or investigation report.

JKT # 5/ 1 Item

7.1.4. Identify the key points of information to be obtained or covered during an investigation or dispositional interview with a significant family member (e.g., parent or spouse) of an adult or juvenile offender. For example:

- Legal rights and responsibilities
- Attitude toward the juvenile or adult and the offense
- Willingness to assume responsibility and authority over juvenile
- View of the offense and reason for juvenile or adult's involvement
- View of appropriate disposition/probation plan
- Willingness to assist and/or cooperate with treatment
- Indicators of substance abuse
- Family subsistence level

- Parent's ability to control and/or discipline juvenile
- Siblings/spousal problems
- History of abuse, family violence
- Involvement with other agencies
- Family criminality
- Juvenile or adult offender's health
- Family composition
- School information
- Employment information

JKT # 5/ 3 Items

- 7.1.5. Given a partially completed juvenile or adult case file including the police report, prior case notes, and other written records, generate a list of interview questions to ask the parent or spouse.

WST # 8

- 7.1.6. Identify the information that must be communicated to a juvenile and his/her parents. This includes the following:

- Hearing date
- Purpose of the hearing
- Legal mandate to attend
- Options available to the court
- Reporting of detention/dispositional decisions back to the referring agency
- Behavioral contract if considering informal probation

JKT # 5/ 3 Items

- 7.1.7. In a simulated interview with the parent or spouse, demonstrate the use of leading questions and active listening techniques using the questions generated in objective 7.1.5. and any other key information obtained.

BST # 3

- 7.1.8. Identify sources of information and types of relevant information these sources provide. For example:

- Relatives
- Employers
- School officials
- Character references
- Treatment program staff
- Persons in the criminal justice system

JKT # 5/ 3 Items

- 7.1.9. Identify the types of information for which release of information waivers must be obtained.

JKT # 5/ 1 Item

MODULE 7.2: VICTIM INTERVIEWS

Instructional Time: 2 hours

OBJECTIVES:

- 7.2.1. Identify the role of the probation officer toward the victim and the rights of victims in the criminal justice system.

JKT # 5/ 3 Items

- 7.2.2. Given a list of types of victim's crimes (e.g., rape, family violence, child abuse, murder, versus property crime) discuss possible sensitivities and needs for each type of victim.

JKT # 5/ 1 Item

- 7.2.3. Identify the key information that should be obtained in an interview with a victim, including the victim's:

- Description of the offense and its impact on him or her
- Statement of loss or injury
- Recommendation for the disposition of the case
- Requests for special probation conditions (e.g., stay away orders, HIV tests, etc.)

JKT # 5/ 4 Items

- 7.2.4. In a simulated interview with a victim, explain the interview purpose, present and explain the Judicial Council Notification of Victim form, and demonstrate the use of leading questions.

BST # 4

UNIT 8.0
RESTITUTION, FINES AND OTHER PAYMENTS
Instructional Time: 4 hours

MODULE 8.1: LEGAL FOUNDATIONS AND TERMINOLOGY

Instructional Time: 4 hours

OBJECTIVES:

8.1.1. Define the following terms using the relevant codes, statutes and Judicial Council Rules:

- Restitution
- Restitution fund
- Restitution fines
- Crime victim's fund
- Penalty assessments
- Fines

JKT # 6/ 6 Items

8.1.2. Given a sample of cases in which fines and restitutions are to be paid, classify each case in terms of the disposition of monies as specified in the law using relevant statutes, e.g., 1202.4 PC and 730.6 WIC and Judicial Council Rules for reference.

JKT # 6/ 5 Items

8.1.3. Identify the classes of claims that are considered losses for restitution purposes using the relevant codes for reference. For example:

- Medical costs
- Psychological harm for 288PC cases
- Lost wages
- Lost profits
- Repair/replacement costs

JKT# 6/ 2 Items

8.1.4. Differentiate implications for failure to pay fines, fees and assessments, including cost of probation, cost of incarceration, drug referral assessments, lab fees, etc. For example: failure to pay fees differ from restitution, fines, etc. Willful failure to pay a fee would not warrant a violation.

JKT # 6/ 4 Items

8.1.5. Identify other collection procedures, including mediation services, collection services, victim proceeding civilly, etc.

JKT # 6/ 3 Items

8.1.6. Given a list of sample claims, classify each claim in terms of its eligibility for restitution. Consider issues such as:

- Insurance companies
- Emotional distress
- Wholesale/retail value
- Double dipping

JKT # 6/ 4 Items

Unit 9.0
COURT REPORTS AND PRESENTATIONS
Instructional Time: 31 hours

MODULE 9.1: COURT REPORTS

Instructional Time: 3 hours

OBJECTIVES:

- 9.1.1. Identify the elements of court reports, social studies and presentence reports that are mandated by the Penal and Welfare and Institutions Codes.

JKT # 7/ 2 Items

- 9.1.2. Explain the purpose and essential content of the following types of court reports:

- Pre-plea
- Bail
- Detention
- Diversion/Deferred Entry of Judgment
- Presentence
- Fitness hearing(707 WIC)
- Dispositional
- Post-sentence/post-dispositional
- Termination of probation
- Violation of probation/Supplemental Petition
- Placement review/progress review

JKT # 7/ 2 Items

- 9.1.3. Identify key principles for writing court reports and making presentations to the court, including:

- Explicit linkage of evaluation and recommendations to objectively presented case facts
- Use of professional language/terminology
- Accuracy and comprehensiveness
- Concise language
- Logical organization
- Chronological order of presentation

JKT # 7/ 2 Items

MODULE 9.2: PRESENTATIONS TO THE COURT AND TESTIFYING

Instructional Time: 2 hours

OBJECTIVES:

- 9.2.1. Identify the roles of the key figures in court. For example:

- Judge
- Attorneys
- Probation officer
- Bailiff
- Court reporter

- Court clerk
- Interpreters

JKT # 7/ 1 Item

9.2.2. Discuss the consequences of poor performance in court by a probation officer. For example:

- Late reports may result in a poor court decision on the case
- Poor performance may undermine the court's confidence in the probation officer and the department
- Poor performance can result in criminal or civil liabilities, contempt of court for the probation officer and the department
- Testimony may be impeached

JKT # 7/ 1 Item

9.2.3. Identify the principles for appearing in court as a witness and/or when making other oral presentations. For example:

- Prior to appearance, contact the person who has called you to court
- Review all relevant source materials prior to the appearance
- Answer questions directly and without elaboration
- Be prepared to say "I don't know"
- Do not offer confidential information
- Address the judge properly
- Procedure for being sworn

JKT # 7/ 1 Item

MODULE 9.3: DISPOSITIONAL ALTERNATIVES IN JUVENILE CASES

Instructional Time: 4 hours

OBJECTIVES:

9.3.1. Explain the role of the probation officer's recommendation in the disposition of a juvenile case.

JKT # 7/ 1 Item

9.3.2. Identify and give examples of the range of alternative dispositions locally available, including (as applicable):

- Ward of the court (WIC 725b)
- Probation without wardship (WIC 725a)
- Dismissal (WIC 653 and 782)
- Dismissal and informal supervision (WIC 654.2)

JKT # 7/ 3 Items

9.3.3. Compare the advantages and disadvantages of the alternative dispositions identified in the previous objective.

JKT # 7/ 1 Item

9.3.4. Explain the purpose and content of the disposition report to the court.

JKT # 7/ 1 Item

9.3.5. Examine the principle of escalating alternatives for wardship.

JKT # 7/ 1 Item

9.3.6. Identify the major factors to be considered in making dispositional recommendations. For example:

- Age
- Type and seriousness of offense
- Mental, physical and emotional condition of the juvenile
- Family situation
- Type of supervision/treatment method
- Resources available
- “best interests of the individual”
- Protection of the community
- Pre-placement preventative services, e.g., family reunification program
- Available confinement time
- Minor’s attitude toward various placements

JKT # 7/ 3 Items

9.3.7. Analyze the following escalating wardship alternatives and the justification required for each placement decision using the principle of escalating alternatives. For example:

- Home
- Home of relative
- Foster home
- Private institution
- Juvenile hall
- Ranch or camp
- California Youth Authority

JKT # 7/ 1 Item

9.3.8. Recognize the possible positive and negative consequences of a good or poor disposition/conditions of probation recommendation by the probation officer.

JKT # 7/ 1 Item

MODULE 9.4: WRITING A REPORT TO THE JUVENILE COURT

Instructional Time: 8 hours

OBJECTIVES:

9.4.1. Given a complete investigation file on a juvenile offender, generate a written court report using the codes, Juvenile Court Rules, and a sample departmental policy manual for reference. This report should be organized into three sections, as follows, and cover the topics indicated and incorporate the principles of performance objective 9.1.3.

Current Offense Information

- Sustained allegations
- Additional pled/proven allegations (enhancements)

Social Study

- Family background
- School record
- Prior record
- Medical/psychological history
- Employment history
- Substance abuse
- Community behavior
- Victim impact statement

Evaluation and Recommendations

- Evaluation of all the facts presented in the first two sections of the report
- Recommendations regarding time of confinement and/or conditions of probation

WST # 9

MODULE 9.5: DETERMINATE SENTENCING

Instructional Time: 4 hours

OBJECTIVES:

9.5.1. Define the following terms and identify their enabling codes:

- Base term
- Enhancement(s)
- Aggravating circumstance(s)
- Mitigating circumstance(s)
- Consecutive versus concurrent
- Time credits (issues: local confinement, state confinement, diagnostic workup)

JKT # 7/ 4 Items

9.5.2. List those factors that are critical in the determination of eligibility for probation, e.g.:

- Judicial Council Rules
- Statutory limitations

JKT # 7/ 2 Items

9.5.3. Given sample case information, demonstrate determinate sentencing calculations.

WST # 10

MODULE 9.6: DISPOSITIONAL ALTERNATIVES IN ADULT CASES

Instructional Time: 2 hours

OBJECTIVES:

9.6.1. Identify the range of alternative dispositions locally available including (as applicable):

- Prison or jail (no probation)
- Fine
- Court probation
- Supervised probation
- Agency specific options (e.g., electronic monitoring, work furlough/release, etc.)
- California Youth Authority
- CRC

JKT # 7/ 3 Items

9.6.2. Compare the advantages and disadvantages of the alternative dispositions identified in objective 9.6.1.

JKT # 7/ 1 Item

9.6.3. Identify the major factors used to justify different recommendations for an adult offender. For example:

- Protection of the community
- Probation eligibility
- Previous grants of probation
- Age
- Type and seriousness of the offense
- Available confinement time
- Mental, physical and emotional condition of the offender
- Family situation/support system in the community/employment
- Type of supervision/treatment method
- Resources available
- "best interests of the individual"

JKT # 7/ 3 Items

9.6.4. Explain the positive and negative consequences of a good or poor recommendation by the probation officer.

JKT # 7/ 1 Item

MODULE 9.7: WRITING A REPORT TO THE ADULT COURT

Instructional Time: 8 hours

OBJECTIVES:

9.7.1. Given a complete investigation file on an adult defendant, generate a written court report using the codes, Judicial Council Rules, and/or determinate sentencing law manual, worksheet (if available) for sentencing calculations and department policy manual for reference. This report should be organized into three sections, as follows, and cover the topics indicated and incorporate the principles of performance objective 9.1.3.

Current Offense Information

- Sustained allegations
- Additional pled/proven allegations (enhancements)

Social Study

- Family background
- School record
- Offense history
- Medical/psychological history
- Employment history
- Substance abuse
- Community behavior
- Victim impact statement

Evaluation and Recommendation

- Evaluation of all the facts presented in the first two sections of the report with aggravation/mitigation/enhancement factors
- Recommendations regarding time of confinement and/or conditions of probation

WST # 11

UNIT 10.0
ESTABLISHING A CASEWORK RELATIONSHIP
Unit Instructional Time: 14 hours

MODULE 10.1: REVIEWING COURT ORDERS AND PREPARING FOR THE ORIENTATION MEETING WITH THE PROBATIONER
Instructional Time: 1hour

OBJECTIVES:

10.1.1. Identify the legal obligations the court order places upon the probation officer.

JKT # 8/ 3 Items

10.1.2. Identify the general conditions of probation and any special conditions that might be applicable to a case involving the following:

- Drug offense
- Sex offense
- Crime against a person
- Crime against property, property loss
- Gang affiliation related offense

JKT # 8/ 3 Items

10.1.3. Explain the importance of the initial interview with the new probationer. For example:

- Sets tone for future contacts
- Provides important opportunity to gather additional information for case planning, assessment
- Establishes the probationer's status as a probationer

JKT # 8/ 1 Item

10.1.4. Given a new probationer's file and the court order, generate a list of interview questions for an initial interview.

WST # 12

10.1.5. Compare the reasons for having the initial interview with a new probationer in:

- The probation officer's office
- The probationer's home
- A neutral setting

JKT # 8/ 1 Item

10.1.6. Contrast the alternative methods for contacting a probationer. For example:

- Telephone
- Mail
- Through the court

- Home visit
- Contact relatives
- Contact employer

JKT # 8/ 1 Item

MODULE 10.2: CONDUCTING THE ORIENTATION MEETING AND INTERVIEW WITH THE PROBATIONER

Instructional Time: 8 hours

OBJECTIVES:

10.2.1. Identify the key things to observe or question during the interview using items in a local risk and needs assessment system or the following items:

- Behavior suggesting anger, aggressiveness, lack of remorse, general mood
- Plans for future
- Living arrangements
- Financial condition
- Family relations and stability
- Medication
- History of being a victim
- Degree of involvement in interview
- Signs of psychological or physical health problems
- Employment status
- Motivation to comply and to succeed
- Degree of acceptance of responsibility for own behavior
- Indicators of gang affiliation

JKT # 8/ 5 Items

10.2.2. Given a sample case file on a new probationer, generate an interview plan including topics to be covered and questions to be asked.

WST # 13

10.2.3. Given a sample case file on a new probationer, demonstrate the use of the local risk and needs assessment system or generate a written assessment of the probationer's needs and level of risk. (i.e., classification)

WST # 14

10.2.4. In a simulated initial interview with a new probationer, demonstrate the following:

- Explain the conditions of probation in clearly understood terms
- Explain search and seizure rights
- Explain criminal justice system – process and role of probation officer
- Explain specific next steps that must be taken
- Obtain probationer's signature indicating understanding of the conditions of probation
- Agree upon goals
- Sign "flash notices" and agency supervision forms
- Complete and explain registration forms (e.g., sex offender registrants)
- Sign release of information forms
- Address code mandated orders (e.g., 1203.4)

- Answer probationer's questions on any of the above

During this interview, the trainee may use any of the following materials for reference purposes: relevant codes, Judicial Council Rules, department policy manuals, probationer's file, court order, test interpretation materials or aids, interview forms, risk/need assessment forms, probationer identification forms or other materials, and/or notes made in preparation for the interview from previous instructional objectives.)

BST # 5

MODULE 10.3: ESTABLISHING CASE GOALS AND PLANS

Instructional Time: 3 hours

OBJECTIVES:

10.3.1. Identify the criteria by which case plans should be evaluated. For example:

- Fulfill conditions of probation specified in Court Order
- Specific behaviors
- Realistic expectations
- Acceptable to both probation officer and probationer where possible
- Congruence with need and risk assessment/classification
- Appropriateness given the charge and the sentence

JKT # 8/ 3 Items

10.3.2. Given a sample case file, generate written goals and a case plan to reach these goals that include the following:

- Specific behavioral measurable case goals
- Specific case treatment goals
- Pattern of supervision including frequency and type of contact
- Areas in which special assistance or monitoring would help the probationer meet case goals (In writing the case plan and goals, the trainee will have access to any or all of the materials available on the case and any special reference materials (e.g., PDR, Codes, etc., if needed.)

WST # 15

MODULE 10.4: FACTORS IN MAKING REFERRALS

Instructional Time: 2 hours

OBJECTIVES:

10.4.1. List the key factors to consider in referring a probationer for services in the community. For example:

Probation factors

- Immediacy of need for evaluation
- Severity of problem
- Type of problem
- Financial status
- Mobility of probationer
- Level of sophistication
- Home/family situation

Provider factors

- Type of facility (e.g., residential, outpatient, private)
- Types of problems served (e.g., alcohol)
- Types of clients served (e.g., adults, juveniles)
- Location
- Availability
- Range of services
- Costs
- Reputation
- Licensing/certification

JKT # 8/ 7 Items

10.4.2. Identify the reasons for establishing a good relationship with local referral agencies or persons. For example:

- Increases the likelihood that the probationer's needs will be met, case goals achieved, and the conditions of probation fulfilled
- Neglecting to do so may lead to various kinds of abuse or miscommunication by the probationer and/or the provider
- Increases the efficiency of placement efforts by the probation department
- When an agency is not meeting needs, funds are being misused

JKT # 8/ 2 Items

UNIT 11.0
PROVIDING COUNSELING AND ASSISTANCE
Unit Instructional Time: 8 hours

MODULE 11.1: RESPONDING TO PROBATIONER QUESTIONS AND REQUESTS

Instructional Time: 3 hours

OBJECTIVES:

11.1.1. Identify the following “rules of thumb” for responding to probationer’s questions:

- Do not respond to personal questions
- Give honest, straightforward answers
- If you do not know, say so
- If you do not know the answer to a question, find out or refer to someone who does know
- Watch for ulterior motives and hidden agendas
- Remember that comments are made and questions asked at a particular time for a particular reason

JKT # 9/ 2 Items

11.1.2. Given a sample of probationer questions/comments, identify those that may suggest hidden agendas. Type of questions/comments that fall in this category include:

- questions regarding when the PO will visit
- seemingly casual leads at the end of an interview
- questions about PO’s ability to obtain police records
- comments about inability to provide urine sample

JKT # 9/ 1 Item

11.1.3. Explain the reasons for listening and responding to probationer’s questions. For example:

- active listening can defuse a crisis
- reinforces the basic relationship
- reinforces the authority and credibility of the probation officer
- helps the probationer succeed and avoid setbacks

JKT # 9/ 2 Items

11.1.4. Given a brief case description, generate answers and/or follow up questions to sample questions from the probationer in the following areas:

- jobs
- possession of a firearm, other weapons
- placement
- reason for meeting with PO
- request to speak with supervisor or change to new PO

WST # 16

MODULE 11.2: INTERSTATE COMPACT AND OUT OF COUNTY JURISDICTIONAL ISSUES

Instructional Time: 1 hour

OBJECTIVES:

- 11.2.1. Delineate the process and legal requirements for Interstate Compact Supervision pursuant to PC 1203 for adults and WIC 1300 for juveniles).

JKT # 9/ 1 Item

- 11.2.2. Identify the process and legal requirements for inter county transfer using the relevant codes for reference.

JKT # 9/ 1 Item

- 11.2.3. Define the parameters and proper application of courtesy supervision.

JKT # 9/ 1 Item

- 11.2.4. Given a case study in which the probationer requests permission to leave the county temporarily, generate a decision regarding permission and a rationale for that decision. This decision must encompass the following considerations:

- where, when, why and with whom the probationer is going
- degree to which the case plan will be disrupted
- specificity of court order regarding leaving
- nature of offense and possible relationship to probationer's request
- time of day or week of request

WST # 17

- 11.2.5. Given a case study in which the probationer requests permanent leave from or within the state, generate a decision and rationale regarding leave which considers the factors noted in objective 11.2.4 plus the following:

- costs/benefits to the probationer vs. potential costs of extradition
- District Attorney's willingness to extradite
- extent to which terms of probation have been met to date
- extent to which extradition laws or policies apply in the case
- nature and seriousness of the offense
- possibility of courtesy supervision
- degree to which request meets legal requirements for transfer (PC 1203.9 for transfer of jurisdiction within state and WIC 750-755 for transfer of wardship within state)
- impact on receiving jurisdiction

JKT # 9/ 3 Items

MODULE 11.3: PROBLEM ASSESSMENT

Instructional Time: 2 hours

OBJECTIVES:

- 11.3.1. Given case studies describing problems of a probationer and/or their family, generate an assessment of the nature and severity of the problem(s) and the probation officer's ability to counsel or assist in each situation.

WST # 18

- 11.3.2. Given samples of probationer and/or family problems, identify possible referral alternatives and community resources in the local area.

JKT # 9/ 2 Items

- 11.3.3. Given case studies describing problems of a probationer and/or their family, classify in terms of the type of problem indicated (e.g., alcohol, sexual abuse, family violence, relationships, employment).

JKT # 9/ 2 Items

MODULE 11.4: CRISIS INTERVENTION COUNSELING

Instructional Time: 2 hours

OBJECTIVES:

- 11.4.1. Given a description of a crisis situation in which one or more persons is emotionally upset, identify appropriate responses by the probation officer.

JKT # 9/ 3 Items

- 11.4.2. Given a description of an interpersonal conflict, identify appropriate responses the probation officer might use to resolve or facilitate resolution of the conflict.

JKT # 9/ 2 Items

- 11.4.3. Given a description of a suicide threat, identify appropriate responses by the probation officer.

JKT # 9/ 2 Items

- 11.4.4. Given a description of a situation involving a drug overdose, identify appropriate responses by the probation officer.

JKT # 9/ 2 Items

- 11.4.5. Demonstrate the principles involved in the above scenarios in a role-play exercise.

BST # 6

UNIT 12.0
MONITORING PROBATIONER PERFORMANCE
Unit Instructional Time: 12 hours

MODULE 12.1: PERSONAL CONTACTS WITH PROBATIONERS

Instructional Time: 2 hours

OBJECTIVES:

- 12.1.1. Given a description of an interaction between a probation officer and a probationer, generate a chronological entry which meets the monitoring and record keeping requirements of PC1203.10 and departmental policy.

WST # 19

- 12.1.2. Identify the reasons for making personal contact with the probationer. For example:

- May be required by conditions of probation and/or departmental policy
- Opportunity to observe probationer's behavior (e.g., signs of substance abuse, physical demeanor)
- Reinforces probationary status and the need to fulfill conditions of probation
- Assures probationer accountability
- Legal liability for negligence

JKT # 10/ 2 Items

- 12.1.3. Identify the reasons for visiting and observing the probationer in a variety of settings.

JKT # 10/ 1 Item

- 12.1.4. Identify potential problems involved in visiting a probationer at work.

JKT # 10/ 1 Item

- 12.1.5. Given a sample case file, generate an interview plan that includes the following items:

- Purpose of the interview
- Questions to be asked
- Risk assessment and need for assistance
- Location of interview (field or office)
- Time of day for interview
- Special consideration (e.g., male PO with female probationer)

WST # 20

MODULE 12.2: OTHER SOURCES OF INFORMATION

Instructional Time: 1 hour 30 minutes

OBJECTIVES:

- 12.2.1. Given a sample case study, generate a list of those individuals who should be contacted during the course of the case, including the frequency of contact, and the purpose of the contact.

WST # 21

12.2.2. Explain the sources, reasons and necessity for obtaining the following informational items:

- Probation related financial records
- Police citations and bookings
- Referral or placement agency

JKT # 10/ 3 Items

12.2.3. Identify the key things to look for in checking reports submitted by the probationer. These include:

- Contacts with police (e.g., arrests)
- Changes in place of residence, work, school
- Omissions in the report
- Discrepancies from other known facts
- Discrepancies from plan for paying fines, restitution, other payments

JKT # 10/ 2 Items

MODULE 12.3: COMMUNICATIONS WITH OTHER AGENCIES ABOUT THE PROBATIONER

Instructional Time: 30 minutes

OBJECTIVES:

12.3.1. Identify the responsibilities of the probation officer in terms of notifying authorities of new law violations and providing assistance in police investigations.

JKT # 10/ 1 Item

12.3.2. Explain why it is important probation departments and law enforcement agencies cooperate.

JKT # 10/ 1 Item

MODULE 12.4: CONTRABAND, EVIDENCE & LEGAL PRINCIPLES OF SEARCHES

Instructional Time: 8 hours

OBJECTIVES:

12.4.1. Define “chain of custody.”

JKT # 10/ 1 Item

12.4.2. Given a scenario, identify the elements which must be documented to maintain the “chain of custody” including:

- Who found the contraband/evidence
- Where it was found
- Who recovered it and marked it
- Who transported it
- Where it was logged in and stored
- The condition of contraband/evidence before and after handling

JKT # 10/ 2 Items

12.4.3. Define the following terms, as they relate to a probation officer:

- Burden of proof (obligation to produce evidence)
- Contraband (item which is illegal to possess)
- Reasonable Cause Searches (a lower level of cause for persons in custody and/o subject to some probation search conditions)
- Weight of evidence required to violate probation (juvenile and adult)
- Spontaneous Statements (statements made in response to a sudden or startling event)

JKT # 10/ 3 Items

12.4.4. Identify the reasons a probation officer's evidence may be introduced in court, including:

- To prove a crime or violation
- To impeach a witness
- To confront testimony of a witness
- To assist court in its determinations

JKT # 10/ 1 Item

12.4.5. Identify the tests that evidence generally must pass before it may be admitted in juvenile or criminal court and discuss applications to probation matters including:

- Must be relevant to the matter at hand
- Must be competently presented in court
- Must have been legally obtained

JKT # 10/ 1 Item

12.4.6. Identify the main purposes of the "rules of evidence":

- To exclude evidence likely to confuse the issues (irrelevant or unreliable)
- To prevent the introduction of unfairly prejudicial evidence (acts of probationer unrelated to charges)
- To prevent the introduction of evidence that is unduly time consuming to present in court

JKT # 10/ 1 Item

12.4.7. Identify those issues relating to asset seizure and forfeiture.

JKT # 10/ 2 Items

12.4.8. Identify the legal principles and typical departmental policies and procedures inherent in conducting person/property searches, including clothed (pat down) and prohibitions against unclothed (strip) searches.

JKT # 10/ 5 Items

12.4.9. Review authority to arrest probationer as specified in 1203.2 PC and 625 WIC and sample department policy

JKT # 10/ 2 Items

12.4.10. Identify the circumstances when a probation officer must advise a juvenile or adult probationer of his/her constitutional rights.

JKT # 10/ 1 item

UNIT 13.0
OFFICER SAFETY: FOUNDATIONS
Instructional Time: 12 hours

MODULE 13.1: PERSONAL SAFETY PRECAUTIONS

Instructional Time: 4 hours

OBJECTIVES:

13.1.1. Given a scenario, identify the safety issues for making a field visit to a probationer. For example:

- Inform office of where you are going, who you are visiting, and estimated time of return
- Upon arrival at site of visit, assess risks as indicated by your understanding of the case and any on-site problem indicators (e.g., noises, parties, odors, dogs, signs of alcohol consumption)
- Follow departmental safety standards and/or procedures

JKT # 11/ 2 Items

13.1.2. Identify policy issues regarding when a probation officer should be accompanied by a police officer when making a field visit to a probationer. (Trainee should have access to any relevant reference materials, e.g., a department policy manual.)

JKT # 11/ 1 Item

13.1.3. Given sample descriptions of interpersonal situations, identify those that have a high potential for assaultive behavior.

JKT # 11/ 2 Items

13.1.4. Given descriptions of interpersonal situations that may or have escalated to violence, identify behavioral descriptions of appropriate probation officer actions.

JKT # 11/ 3 Items

13.1.5. List the “universal safety precautions” and their applications to probation supervision functions, e.g., searches, taking urine samples, etc

WST # 22

13.1.6. Describe the symptoms and methods of transmission of air borne diseases such as tuberculosis, and how these diseases may present particular issues when transporting probationers.

JKT # 11/ 1 Item

MODULE 13.2: SEARCHING BUILDINGS AND VEHICLES

Instructional Time: 3 hours

OBJECTIVES:

13.2.1. Identify steps that should be taken before a planned search is conducted.

JKT # 11/ 2 Items

- 13.2.2. Identify procedures for coordinating searches with other agencies, particularly if hazardous materials and/or weapons may be present.

JKT #11/ 1 Item

- 13.2.3. Demonstrate systematic and safe procedures when conducting searches of rooms, facilities, outbuildings, automobiles, including how to respond to the finding of hazardous materials, weapons, etc.

BST # 7

MODULE 13.3: PREPARATION FOR TRANSPORT

Instructional Time: 1 hour

OBJECTIVES:

- 13.3.1. Identify the steps to follow in preparing to transport a probationer, including:

- Determine reason for transport
- Determine appropriateness of transport given departmental policy
- Plan route to destination and parking
- Determine the appropriate level of security
- Search transportation vehicle before transporting probationer
- Assure that vehicle and seat belts are operable
- Search probationer if appropriate
- Search transportation vehicle after transporting probationer
- Identify limitations on transportation, such as: number of people to be transported in one vehicle; transporting male and female probationers together; special issues regarding the use of vehicles equipped with cages.

JKT # 11/ 2 Items

- 13.3.2. Given descriptions of transport situations, generate an appropriate plan for conducting each transport.

WST # 23

- 13.3.3. Identify the consequences of failure to take proper precautions and/or follow procedure in transporting a probationer.

JKT # 11/ 2 Items

MODULE 13.4: PRINCIPLES OF USE OF FORCE

Instructional Time: 3 hours

OBJECTIVES:

Note: Use of force shall conform to the policies and procedures of each individual agency.

- 13.4.1. Identify the legal framework for a probation officer's use of reasonable force in making an arrest, including the following principles:

- Penal Code Section 835a

- Definition of an arrest: physically restraining the person to be arrested or by the person submitting himself to the authority of the officer, Penal Code 835.

JKT # 11/ 2 Items

- 13.4.2. Given examples of situations requiring the use of physical force, identify actions that would constitute reasonable force using relevant codes, statutes, and case law materials for reference.

JKT # 11/ 2 Items

- 13.4.3. Given examples of situations requiring the use of physical force, identify actions that would constitute excessive force.

JKT # 11/ 2 Items

- 13.4.4. Identify the following guidelines that a probation officer should consider prior to employing the use of force, including the following:

- Force should be used only when other alternatives have failed
- Force must be no more than is necessary to control the situation, effect an arrest or prevent an escape
- Force is to be viewed primarily as a defensive measure
- All uses of force should be thoroughly documented

JKT # 11/ 2 Items

- 13.4.5. Given sample descriptions of interpersonal situations with probationers, identify predictors of assaultive behavior.

JKT # 11/ 2 Items

- 13.4.6. In a simulated exercise, demonstrate behaviors or verbal interventions that a probation officer can use to de-escalate problems.

BST # 8

- 13.4.7. Examine the psychological and physiological factors that affect a person threatened with danger including the following:

- Confidence in one's abilities
- Development of instinctive reaction
- Mental alertness and concentration
- Self-control over emotions and body

JKT # 11/ 1 Item

MODULE 13.5 PRINCIPLES OF USE OF RESTRAINTS

Instructional Time: 1 hour

OBJECTIVES:

- 13.5.1. Identify the following purposes, laws and principles for using handcuffs on probationers including the following:

- As a safety device for both the probation officer and the probationer
- For temporary restraint to prevent attack, escape, concealment or destruction of evidence/contraband/property
- To prevent self-inflicted injury on the part of the probationer

JKT # 11/ 1 Item

13.5.2. Explain the limitations for use of handcuffs, such as:

- May not be used as an impact weapon
- May not be used as a punitive measure
- May not be used to secure a subject to a permanent object if used for non-secure detention
- Males and females may not be handcuffed together
- Juveniles and adults may not be handcuffed together
- Mentally ill subjects should be handcuffed alone
- Avoiding positional asphyxia

JKT # 11/ 2 items

13.5.3. Identify the correct terminology to describe the handcuff.

JKT # 11/ 1 Item

UNIT 14.0
OFFICER SAFETY: PHYSICAL SKILLS TRAINING
Unit Instructional Time: 16 hours

NOTE: This unit must be presented in blocks of instruction no greater than four (4) hours. Additionally, a minimum of 48 hours is required between sessions to minimize the risk of injury to the trainee and to allow adequate time to assimilate skills. The dotted line between modules indicates when a 48-hour break in training should occur. The sample outline in Section C of this manual illustrates how this unit may be scheduled.

In all phases of the instruction, the maneuvers are to be simulations of limited resistance and force (in some cases at half speed) to avoid injury to the trainee or role player.

Proper safety equipment must also be available such as floor mats, athletic knee pads and mouth guards, if appropriate.

The Behavior Skills Tests are specified for several of the performance objectives in this unit. For clarity, the Behavior Skills Test notation is made at the end of each performance objective. However, the instructor may elect to test trainees during the last module (14.6). This module has two hours allocated for testing and review.

The physical skills training in this unit is limited by design. It is intended to be introductory in nature enabling the trainee to engage in a limited number of basic, practical applications.

Further, the training is intended for the **majority** of probation officers statewide who carry out the functions of routine court, office and field situations. It is not intended to equip the minority of probation officers who are assigned to specialized, intensive field supervision positions with the skills necessary to perform those duties, (although this unit will provide a platform on which further training may be given). For those probation officers who perform the more physically demanding field supervision duties, agencies are strongly encouraged to provide additional physical skills training beyond the scope of this course.

MODULE 14.1: EVASIVE AND BLOCKING TECHNIQUES

Instructional Time: 2 hours

OBJECTIVES:

14.1.1. Participate in instructor led Warm-Up Exercises such as the following:

- Walking in place
- Jogging in place with exaggerated arm swing
- Trunk twists and side bends
- Standing bent knee toe touch

No Test

14.1.2. Participate in instructor led Flexibility Exercises such as the following:

- Seated toe touch
- Seated groin stretch
- Supine cross legged sciatic stretch
- Standing straight legged calf stretch
- Standing bent legged calf stretch
- Wrist, arm and shoulder stretch

- Standing hand to opposite shoulder blade stretch
- Standing quadriceps (front thigh) stretch
- Three way neck stretch

No Test

Safety Note: Each stretching position should be taken to the point of maximum tension but prior to pain or discomfort. These stretches should avoid bouncing or “ballistic” types of movements. The stretches should be held for 15-30 seconds during which time students should be encouraged to breathe deeply and relax.

14.1.3. Demonstrate the course instructed balance, footwork and body movements to avoid an attacking person. These movements to incorporate the following:

- Balance
- Position in response to subject’s movements
- Self-control

BST # 9

14.1.4. Demonstrate the course instructed footwork to evade an attack. For example:

- Not backing straight up in the line of attack
- Moving laterally or diagonally out of the line of attack
- Using pivoting techniques

BST # 10

14.1.5. Demonstrate course instructed techniques using hands and arms to block an attack. These techniques are not required to incorporate advanced blocking motions. They may be simply using hands and arms to protect the head.

BST # 11

MODULE 14.2: HANDCUFFING

Instructional Time: 2 hours

OBJECTIVES:

14.2.1. Demonstrate proper manipulation of handcuffs. For example:

- Retrieval
- Pistol grip by chain
- Ensuring swing arm is facing toward subject’s wrist
- Ensuring that handcuffs are not doubled locked before attempting to place them on the subject’s wrist
- Once placed on subject’s wrist, checking for excessive tightness before double locking
- Double locking on subject’s wrist

BST # 12

14.2.2. Demonstrate handcuffing a compliant, non-threatening subject incorporating the principles in objective 14.2.1

BST # 13

14.2.3. Demonstrate assisting a handcuffed person who is prone to his/her feet incorporating the following:

- Appropriate verbal instructions to the subject during the assist
- Not pulling up subject by his/her arms
- Avoiding possibility of positional asphyxia

BST # 14

14.2.4. Demonstrate assisting a handcuffed person to a sitting position in a vehicle ensuring that the subject:

- Maintains balance
- Does not hit his/her head when entering the vehicle
- Is properly secured with a seat belt

BST # 15

14.2.5. Participate in the following instructor led cool down exercises:

- Trainees walk perimeter of exercise area, or
- Walk in place as in the warm-up exercises.

No Test

.....

MODULE 14.3: ARREST AND CONTROL TECHNIQUES

Instructional Time: 4 hours

OBJECTIVES:

14.3.1. Participate in instructor led Warm-Up Exercises such as the following:

- Walking in place
- Jogging in place with exaggerated arm swing
- Trunk twists and side bends
- Standing bent knee toe touch

No Test

14.3.2. Participate in instructor led Flexibility Exercises such as the following:

- Seated toe touch
- Seated groin stretch
- Supine cross legged sciatic stretch
- Standing straight legged calf stretch
- Standing bent legged calf stretch
- Wrist, arm and shoulder stretch

- Standing hand to opposite shoulder blade stretch
- Standing quadriceps (front thigh) stretch
- Three way neck stretch

No Test

14.3.3. In a simulation, demonstrate two course instructed joint lock control holds incorporating the following:

- Balance
- Maintaining a position of control and advantage
- Proper foot movements
- Joint lock mechanisms

BST # 16

14.3.4. In a simulation, demonstrate a course instructed “take-down” technique incorporating the following:

- Balance
- Maintaining a position of control and advantage
- Proper foot movements

BST # 17

Safety Note: Instruction should be delivered using proper safety equipment such as floor mats, athletic knee pads (fabric covered foam rubber) and mouth guards if appropriate.

14.3.5. Participate in the following instructor led cool down exercises:

- Trainees walk perimeter of exercise area, or
- Walk in place as in the warm-up exercises.

No Test

MODULE 14.4: SEARCHING THE PERSON

Instructional Time: 4 hours

OBJECTIVES:

14.4.1. Participate in instructor led Warm-Up Exercises such as the following:

- Walking in place
- Jogging in place with exaggerated arm swing
- Trunk twists and side bends
- Standing bent knee toe touch

No Test

14.4.2. Participate in instructor led Flexibility Exercises such as the following:

- Seated toe touch
- Seated groin stretch

- Supine cross legged sciatic stretch
- Standing straight legged calf stretch
- Standing bent legged calf stretch
- Wrist, arm and shoulder stretch
- Standing hand to opposite shoulder blade stretch
- Standing quadriceps (front thigh) stretch
- Three way neck stretch

No Test

14.4.3. Demonstrate the principles of searching an individual in a “pat down” or “cursory search” so that the effectiveness of the search and the safety of the officer is maximized incorporating the following:

- Being constantly alert
- Maintaining a position of control and advantage
- Thoroughness of the search
- Conducting the search from the rear
- Searching with one hand, controlling with the other
- Searching systematically by proper use of hand technique (for example: spider crawl)
- Not looking where searching, eyes on subject and surroundings
- If weapon found, notify covering officer immediately and maintain control of subject and weapon

BST # 18

14.4.4. Demonstrate covering officer responsibilities during a search of a subject including the following:

- Protecting searching person from outside interference
- Keeping subject under continuous observation
- Reinforcing the officer’s psychological control of the subject by the presence of a second officer
- Providing physical assistance to the searching officer, as needed

BST # 19

14.4.5. Demonstrate the principles of searching an individual in a high risk/arrest situation so that the effectiveness of the search and the safety of the officer is maximized incorporating the following:

- Awareness
- Balance
- Verbal instructions
- Systematic search
- Controlling holds
- Handcuffing as appropriate
- Patterns of movement

BST # 20

14.4.6. Identify the common places where dangerous weapons or contraband can be located on a subject’s person, including the following:

- Hair
- Underarm area
- Pockets
- Groin area
- Small of back
- Waist
- Belt buckle, belt buckle area
- Pocketbooks, purses, wallets, planners
- Ankles
- Jewelry, lighters
- Clothing (e.g., shirt and pant cuffs)
- Under hats
- Sleeves
- Collar/lapels
- Electronic devices (pagers, cell phones, etc.)

JKT # 11/ 1 Item

14.4.7. Demonstrate handcuffing a subject from the searching position incorporating the following:

- Joint locks
- Cuff retrieval from waistband or belt

BST # 21

14.4.8. Participate in the following instructor led cool down exercises:

- Trainees walk perimeter of exercise area, or
- Walk in place as in the warm-up exercises.

No Test

MODULE 14.5: TWO OFFICER ARREST AND CONTROL TECHNIQUES

Instructional Time: 2 hours

OBJECTIVES:

14.5.1. Participate in instructor led Warm-Up Exercises such as the following:

- Walking in place
- Jogging in place with exaggerated arm swing
- Trunk twists and side bends
- Standing bent knee toe touch

No Test

14.5.2. Participate in instructor led Flexibility Exercises such as the following:

- Seated toe touch
- Seated groin stretch
- Supine cross legged sciatic stretch
- Standing straight legged calf stretch
- Standing bent legged calf stretch

- Wrist, arm and shoulder stretch
- Standing hand to opposite shoulder blade stretch
- Standing quadriceps (front thigh) stretch
- Three way neck stretch

No Test

14.5.3. Demonstrate a course instructed two officer, one subject take down technique incorporating the following:

- Correct positioning of two person configuration
- Controlling the subject's legs above the knees
- Communication between officers

BST # 22

Safety Note: Adequate supervision must be maintained by the instructor during these simulations. Trainees should be advised to simulate the procedures at maximum of half-speed.

MODULE 14.6: PHYSICAL SKILLS TESTING AND REVIEW

Instructional Time: 2 hours

OBJECTIVES:

14.6.1. Review all course instructed techniques.

No test

14.6.2. Demonstrate the skills and techniques as described in the Behavior Skills Tests for this unit.

14.6.3. Participate in the following instructor led cool down exercises:

- Trainees walk perimeter of exercise area, or
- Walk in place as in the warm-up exercises.

No Test

Unit 15.0
RESPONDING TO PROBATIONER PERFORMANCE
Unit Instructional Time: 7 hours

MODULE 15.1: VIOLATIONS OF PROBATION OR NEW LAW VIOLATIONS

Instructional Time: 4 hours

OBJECTIVES:

15.1.1. Explain the reasons for periodic review and response to probationer behavior. For example:

- Required by law where behavior violates conditions of probation or another law
- Required to maintain safety of community
- Reinforcement of progress is central to the rehabilitation process
- Status may call for changes in frequency of contact thus allowing the probation officer to focus attention on cases with higher level of risk or need

JKT # 12/ 2 Items

15.1.2. Given a description of an incident, classify the behavior of the person(s) involved as legal or illegal using the relevant codes for reference.

JKT # 12/ 1 Item

15.1.3. Given sample cases, generate alternative ways of responding to probationer behavior (e.g., informal handling, arrest) and compare the advantages and disadvantages of each alternative.

JKT # 12/ 2 Items

15.1.4. Given a sample case, generate a violation of probation report and an appropriate recommendation on an adult case using the relevant codes for reference.

WST # 24

15.1.5. Define the following types of Juvenile Court Violation Reports

- 602/777(a) WIC
- 602/777(b) WIC
- 602/777(e) WIC

JKT # 12/ 3 Items

15.1.6. Identify the time frames within which juvenile and adult violations must be filed using Department and Court Policy reference materials.

JKT # 12/ 1 Item

15.1.7 Identify the consequences of inappropriate response to a new law violation or a violation of probation conditions. For example:

- Danger to the community
- Legal liability for failure to report violations
- Improper handling may undermine the case against the probationer

JKT # 12/ 2 Items

- 15.1.8. Given sample Juvenile and Adult cases, describe the method for obtaining an Arrest Warrant on each.

JKT # 12/ 2 Items

MODULE 15.2: MODIFICATIONS OF CASE PLAN

Instructional Time: 1 hour 30 minutes

OBJECTIVES:

- 15.2.1. Given a case study including progress reports, reassess the probationer's status with respect to case goals and generate a written plan suggesting modification of plan or other specific responses to the probationer's behavior. This plan must be consistent with the original court order.

WST # 25

- 15.2.2. Given the same case study, discuss options for early termination of active supervision, such as:

- Administrative Caseload (Banked)
- Relief of Supervision/Conditional Sentence
- Early Termination

JKT # 12/ 1 Item

MODULE 15.3: PRIORITY SETTING FOR PROBATION OFFICER FUNCTIONS

Instructional Time: 1 hour 30 minutes

OBJECTIVES:

- 15.3.1. Given a sample set of investigation functions, generate a schedule for completing the steps required (e.g., interview defendant, obtain written records from outside sources, etc.) prior to court filing deadlines, using all relevant resources.

WST # 26

- 15.3.2. Given a sample set of supervision functions (e.g., as received via in-box, voice mail, directives from supervisor, court, requests from law enforcement, schools, etc.), designate the priority in which those responsibilities should be handled and support this approach.

WST # 27

Unit 16.0
CPR

Unit Instructional Time: 4 hours

This is a minimum four (4) hour course for probation officers. It must include 2-person CPR techniques. The instructors must be certified by a duly authorized agency.

SECTION E: TEST BY PERFORMANCE OBJECTIVE INDEX

The Test by Performance Objective Index presents the linkage of performance objectives to specific Job Knowledge Tests (**JKT**), Written Skills Tests (**WST**), and Behavior Skills Tests (**BST**). Each test represents a learning domain (knowledge or skill area) that is composed of one or more performance objectives, usually following the topical outline.

Together with the information provided for each objective in Section D of this manual, the Test by Performance Objective Index provides a framework for constructing tests to be used in the course. The following steps are recommended to aid the training provider in the development of their tests.

Step 1: Identify the performance objective(s) in the test you wish to construct. These are indicated in the right hand column of the index.

Step 2: To develop a **Job Knowledge Test**:

1) From the Index, determine the number of multiple choice items to be included in the test shown in the # Items column. This number represents an adequate sampling for the learning domain. An adequate sampling is usually considered to be no less than 20 items. The Job Knowledge Test can be augmented by Written Skills Tests and/or Behavior Skills Test to increase the reliability of measuring a trainee's grasp of the material. Training providers may increase the number of questions.

2) From Section D of this manual determine the number of questions (items) called for to measure the performance objectives that are to be included in the test. The number of test items is shown for each objective. This specification indicates the minimum number of items within the test that should be developed to measure the trainee's learning for the particular performance objective.

3) Prepare test items.

4) Determine approximate testing time by multiplying the number of test items by one-half minute (30 seconds).

Step 3: To develop a **Written Skill or Behavior Skill Test**:

1) Locate in Section D of this manual the performance objective that is written to measure the trainee's learning by this type of test. The performance objective is written as a job simulation activity.

2) Prepare a job performance simulation activity that can be completed by each trainee in the instructional time frame.

Please refer to the **Handbook for Presenting Core Courses** for more detail on test administration and scoring. An additional publication, *Test Item Writing for Core Courses*, is also available for the development of questions for the Job Knowledge Tests.

Test By Performance Objective Index

<u>Job Knowledge Test</u>	<u># Items</u>	<u>Performance Objectives</u>
1	63	2.1.1, 2.1.2, 2.1.3, 2.1.4, 2.2.1, 2.2.2, 2.2.3, 2.2.4, 2.3.1, 2.4.1, 2.5.1, 2.5.2, 2.5.3, 2.7.1, 2.7.2, 2.7.3, 2.8.1, 2.8.2, 2.8.3, 2.9.1, 2.9.2, 3.1.1, 3.1.2, 3.1.3, 3.1.4, 3.1.5, 3.1.6, 3.1.7, 3.1.8
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Test By Performance Objective Index

<u>Written Skills Test</u>	<u>Objective</u>	<u>Behavior Skills Test</u>	<u>Objective</u>
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5	5.1.11	5	10.2.4
6	5.1.12	6	11.4.5
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17	11.2.4	17	14.3.4
18	11.3.1	18	14.4.3
19	12.1.1	19	14.4.4
20	12.1.5	20	14.4.5
21	12.2.1	21	14.4.7
22	13.1.5	22	14.5.3
23	13.3.2		
24	15.1.4		
25	15.2.1		
26	15.3.1		
27	15.3.2		

SECTION F: INSTRUCTIONAL OBJECTIVE BY TASK INDEX

This index documents the job relatedness of each objective that has been included in the PO Core Training Course. Because of space limitations, core tasks are listed by number in this index. However, Section G, titled Core Tasks for Probation Officers, presents each core task's narrative statement as it was when the tasks were evaluated by Probation Officers during the job task analyses of 1982-1987, 1989-1990, 1993-1994 and 1997-1998. The task numbers shown in this index correspond to the task numbers in the Section G task list. Together, these sections will enable the correctional trainer, employer and employee to study the relationship between core tasks and objectives.

PROBATION OFFICER

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14.3.3	270, 275
14.3.4	270, 275
14.3.5	All Physical Tasks
14.4.1	All Physical Tasks
14.4.2	All Physical Tasks
14.4.3	99, 100
14.4.4	99, 270, 275
14.4.5	99, 270, 275
14.4.6	99, 100
14.4.7	99, 271, 272
14.4.8	All Physical Tasks
14.5.1	All Physical Tasks
14.5.2	All Physical Tasks
14.5.3	270
14.6.1	All Physical Tasks
14.6.2	All Physical Tasks
14.6.3	All Physical Tasks
15.1.1	53, 108, 110, 182
15.1.2	111, 112, 114
15.1.3	53, 112
15.1.4	150, 152, 153
15.1.5	152, 153
15.1.6	114
15.1.7	53, 108, 114, 131
15.1.8	113
15.2.1	108, 152, 164, 255

Objective	Relevant Core Task
15.2.2	110
15.3.1	All Investigation Related Tasks
15.3.2	All Supervision Related Tasks

SECTION G: CORE TASKS FOR PROBATION OFFICERS

The following list is provided for the convenience of core training providers, employers and employees. This list presents the tasks and their responsibilities that were identified as necessary and important for probation officers to perform their job. The list is taken from the Job Analysis Questionnaire used in the original Standards Project of 1983-85 and the subsequent re-analysis projects of 1989-90, 1993-94, and 1997-98. The original item number is included in the list. The task numbers are not sequential because not every task in the questionnaire was identified as a core task. The tasks in this section are the statewide core tasks for the majority of probation officers in California.

PROBATION OFFICER CORE TASKS

1. Review police report of charges against a juvenile who has been cited or taken into custody.
10. Decide whether to hold in appropriate facility or release juvenile (300, 601, or 602).
11. Advise institutional staff of any detention problem.
17. Review juvenile booking sheet.
18. Check Juvenile Hall log and/or talk with Juvenile Hall staff to determine juvenile's attitude, conduct, and condition.
19. Check probation files for details of any prior contact a juvenile has had with Probation Department.
20. Advise juvenile status offender (601) or law violator (602) of his/her constitutional rights or Miranda warnings, and ensure juvenile understands rights.
22. Interview juvenile to obtain background information and information about the offense; record this information for the file.
23. Interview parent or other adult associated with juvenile to obtain background information and information about the offense; record this information for the file.
26. Check juvenile's prior arrest record and/or police contacts.
27. Decide whether to (1) close the case; (2) release the juvenile on promise to appear in court; (3) handle informally; or (4) detain.
29. Counsel juvenile who will be released without further action.
30. Contact law enforcement, other correctional agencies, or other probation officers who may have an interest in the juvenile to advise that the juvenile is in custody.
31. Inform juvenile and parent of date of detention hearing.
32. Have juvenile and parent agree to appear at hearing.
33. Discuss case with District Attorney to determine whether there is sufficient evidence to file charges and whether the seriousness of the offense warrants filing.
34. At detention hearing, present recommendation to detain or release juvenile and recommendation as to how case should be handled.
36. Prepare necessary paperwork for District Attorney to use in filing Juvenile Court petition in law violation cases.
37. Conduct intake or pre-sentence interview with adult who has pled or been found guilty of an offense.
38. Determine filing deadlines and court appearance deadlines

39. Review District Attorney's file for court referral form, police report, plea or jury verdict, and/or any other paperwork pertaining to the current offense.
40. Review CII rap sheet, FBI rap sheet, Department of Motor Vehicles printout, probation file, and/or other records pertaining to prior criminal record.
41. Interview juvenile/adult and co-defendants to get their description of the offense and background information.
42. Interview members of juvenile's/adult's immediate family, relatives, employers, school officials, character references, and others about the social, educational, and work history and adjustment of the juvenile/adult.
44. Obtain juvenile/adult or parent release for medical, psychiatric, or other information.
45. Write for verification of employment, education, and/or other pertinent background information.
46. Interview persons in the criminal justice system (such as arresting officer, District Attorney, defense attorney) to get their descriptions of the offense.
47. Contact law enforcement agencies in other jurisdictions to uncover any previous trouble and/or to learn the disposition of prior arrests.
48. Contact treatment programs, other probation officers, or parole officers to obtain information on their experience with the juvenile/adult.
50. Contact victim(s) and notify them of their right to appear in court.
53. Evaluate the seriousness of a violation of probation and decide whether to file charges.
55. Compute credit for time served, good time, and work time, for judge at sentencing.
56. Read Penal Code and review sentencing manual to determine aggravating and mitigating circumstances of the crime.
57. After information has been gathered (in investigation section), decide which facts of the case represent aggravating or mitigating circumstances of the crime.
58. After information has been gathered, decide whether to recommend that juvenile who is 14 years of age or older be tried in Adult Court.
59. After information has been gathered, decide whether to recommend that juvenile be made a ward of the court.
60. After information has been gathered, decide whether to recommend removal of juvenile or adult (for example, adult child abuser) from home.
61. After information has been gathered, decide recommendation regarding sentence and/or terms and conditions of probation.
63. Investigate private placements available (e.g., group homes, foster homes, relatives) for juveniles who will be placed outside of the home.

65. Determine recommended placement (for example, own home, Department of Corrections, jail; this task does not include treatment programs or other referral sources).
67. Contact probationer about to be released from custody to set up initial interview appointment.
68. Review probationer's file to become familiar with the nature of the offense, prior record, and individual's social, educational, and employment history.
70. Review terms and conditions of probation with probationer and family.
71. Interview new probationer to assess his/her needs.
74. Interview new probationer to assess the risk she/he poses to the community.
78. Decide on the frequency of contact needed during supervision, on the basis of the risk involved, and the needs of the probationer.
79. Consult with outside agencies to which the probationer has previously been referred to get their input (for example, for development of a treatment plan.)
80. Set goals for treatment or probationer's conduct under supervision (develop a treatment plan, for example).
81. Draw up contract with juvenile outlining conditions of informal probation.
87. Contact victim(s) and ask them to detail their losses and estimate the dollar value of the loss.
88. Evaluate restitution claims submitted by victim(s).
89. Challenge victim(s)' claims for restitution which seem unjustified.
90. Determine recommendation on the amount of restitution due the victim(s).
91. Interview probationer/client and/or family to determine ability to pay restitutions, fines, and other payments.
93. Set up a payment schedule of fines, restitution, and other payments.
94. Interview probationer to determine progress toward treatment goals and compliance with terms and conditions of probation.
95. Interview parents, relatives, school officials, employers, and/or others in probation officer's office or over the phone to check on probationer's conduct and compliance with terms and conditions of probation.
96. Visit the home, neighborhood, school, and/or work place of probation/client to check on the individual's conduct and compliance with terms and conditions of probation or wardship.
97. Search probationer's residence (with or without police assistance) for contraband, weapons or other evidence of violation of law or probation.

98. Search probationer's automobile (with or without police assistance) for contraband, weapons or other evidence of violation of law or probation.
99. Search probationer's person (with or without police assistance) for contraband, weapons or other evidence of violation of law or probation.
100. Collect and preserve evidence.
101. Review report forms submitted by probationers (or other regular written report from probationer) to check place of residence, employment, probationary payments (fines, restitution, or support), and arrests in the preceding month.
102. Review department reports to monitor payment of fines, restitution, or other payments by the probationer.
103. Observe collection of urine samples for drug testing.
104. Check for physical signs of drug abuse by probationer/client (as ordered by the court or as part of regular monitoring).
105. Get progress reports (orally or in writing) from referral sources (treatment, educational, employment, or training programs) working with a probationer/client (as ordered by the court or as part of regular monitoring).
106. Visit placement/treatment agencies to discuss probationer's/client's progress with probationer and agency staff.
107. Call or correspond with staff and/or administrators of placement agencies about the behavior of probationer/client.
108. Evaluate extent to which probationer is making satisfactory progress toward goals and is complying with conditions of probation.
110. Reclassify cases that no longer require personal contact to "minimum supervision" status or refer to a "bank caseload".
111. Review citations issued by police and/or bookings in jail or juvenile hall for violations of probation or new offenses by probationers.
112. Arrest probationers who violate the law or conditions of probation.
113. Request warrant from court on missing probationer.
114. File petition or request that petition be filed to initiate court process when probationer violates terms of probation or commits a new offense.
115. Review request for permission to leave county or state temporarily and decide whether to approve or deny request.
116. Review request for permission to leave county permanently (change of residence to another county or state) and decide whether to approve or deny request.
117. Initiate procedures to recommend transfer of case to appropriate court in new jurisdiction.
118. Initiate procedures to request Interstate Compact Supervision for probationers wishing to leave the state permanently.

119. Refer probationer/client for professional evaluation (for example, medical, psychological, alcohol or drug evaluation) as requested by the court.
120. Identify treatment, educational, employment, or other program (for example, alcohol, drug, or counseling treatment program) which will meet the needs of a probationer/client, his/her family, or others.
121. Contact treatment, educational, training, or employment program, or other community agency, describe probationer's/client's needs, and obtain their commitment to work with the probationer/client.
123. Refer probationer/client to appropriate program or agency.
124. Refer members of probationer's/client's family, victim(s), or others to counseling and/or other appropriate program or agency.
125. Follow up to verify that probationer or other individual received service and to evaluate the success of referral.
126. Respond to questions from probationer/client in person or over the telephone.
127. Respond to calls and/or correspondence requesting information about probationer/client or from individuals who want to discuss the probationer/client.
128. Inform police department of law violations by probationer/client.
129. Give police department information which may help them investigate a case.
130. Notify other agencies (for example, Welfare) of information in which they may have an interest (for example, change of placement).
131. Notify anyone who is the specific object of threats by a probationer/client.
132. Do individual counseling regarding personal problems with probationer/client, members of probationer's/client's family, or others.
133. Assist probationers/client or other individuals experiencing personal crises.
134. Discuss probationer's/client's financial circumstances and assist with budgeting and/or help probationer/client obtain financial assistance (for example, welfare, loans).
139. Verbally intervene in potentially violent interpersonal situations.
141. Prepare report giving recommendation to detain or release juvenile and rationale for recommendation.
144. Prepare fitness report for juveniles over the age of 14 charged with violations of criminal record.
146. Prepare pre-sentence or pre-plea report to Superior Court.
147. Prepare disposition report to Juvenile Court.
150. Prepare supplemental report on results of professional evaluation (for example, psychiatric, medical) and any additional recommendations based on that evaluation.

152. Prepare supplemental report updating the court on progress of probationer or ward of the court (for example, annual review or progress report).
153. Prepare report for supplemental action (e.g., revocation, modification, or termination of probation).
155. Prepare memorandum to the court.
157. Fill out probation department forms or other forms.
158. Write or dictate internal memos.
159. Write or dictate correspondence.
160. Take notes for own use.
161. Write case notes in probation file or keep chronological reports about probationer/client (manually or electronically).
162. Make log entries.
163. Write or dictate case/treatment plan (manually or electronically).
164. Write or dictate case review (summary of case progress).
167. Pull files and gather paperwork to be forwarded to others.
168. Gather data for statistical reports (e.g., caseload count and composition, grants, special funding, time studies, etc.)
169. File paperwork in own desk, file drawer or filing cabinet.
170. Proofread and/or edit reports that have been typed.
171. Review case file prior to appearing in court at case hearing.
172. Appear in court and answer questions about case.
173. Testify at hearing or in court as a witness.
175. Recognize and notify superiors of erroneous or improper recommendations and offer alternative recommendation.
182. Provide information and update the court orally on status of a probation case.
186. Respond to general questions from citizens – in person, over the telephone, or in writing.
189. Give presentations to schools, community agencies, and civic groups.
190. At the request of parents or others, speak with juveniles about their concerns or problems.
192. Visit placement facilities to learn about and evaluate the care and/or treatment they provide.

193. Visit community-based organizations to learn about their services and evaluate the care and/or treatment they provide.
196. Contact Social Services Department, schools, law enforcement and other agencies to develop or maintain continuing working relationship.
199. Give assignments and/or instructions to other probation officers, aides, other probation department personnel or volunteers.
224. Transport individuals (for example, from detention site to court, hospitals, airports, and referral programs).
225. Travel for agency related work other than transporting individuals.
226. Arrange for transportation of individuals (e.g., from detention site to court/hospitals, airports, and referral programs).
227. Consult or share information with co-workers (for example, to discuss recommended dispositions, treatment plans, and appropriate referrals).
228. Consult or share information with supervisor (e. g, discuss recommended dispositions, treatment plans, appropriate referrals).
229. Present cases to a committee that reviews recommendations (e.g., placement recommendations).
230. Keep informed on case law and sentencing precedents.
231. Keep informed of departmental policies and procedures.
235. Read internal memos, correspondence.
236. Attend meetings of probation department staff.
237. Attend training courses or seminars offered by the department or outside the department.
245. Report needed maintenance to appropriate person.
247. Contact parent, guardian, or responsible relative to notify them that juvenile is in custody.
248. Evaluate fitness of parent and extent to which there exists present or likely danger to minor.
249. Interview victims to get their descriptions of the offense and obtain a victim impact statement.
250. Refer complaints of suspected child neglect/abuse and file appropriate notifications under the law.
251. Refer complaints of suspected elder abuse and file appropriate notifications under the law.
252. Refer complaints of suspected domestic violence to proper agencies for assistance.
253. Submit sample for drug testing.

254. Maintain chain of evidence of drug test sample and request that sample be retained.
255. Determine whether to recommend revocation, modification, or termination of probation.
256. Share appropriate information with law enforcement agencies.
257. Represent probation department perspective in joint operations with other law enforcement/corrections agencies (such as gang task force, etc.).
258. Notify victim as required by law when probationer is released.
259. Prepare Alcohol, Drug, Domestic Violence, Developmentally Disabled or other Diversion/Deferred Entry of Judgement Report
260. Prepare court documents for Judge's signature (e.g., arrest warrants, terms and conditions of probation, ex-parte orders).
261. Refer calls from media to agency Public Information Officer (PIO) or designated contact person and/or alert PIO to sensitive issues.
262. Provide information and update the court orally on status of a probation case.
263. Recognize and communicate changes or trends in court policies to other probation department staff.
264. Conduct special projects, studies, and investigations ordered by the court.
265. Obtain and process court documents needed by probation department staff.
266. Coach, train, or assist in training other probation department personnel or volunteers.
267. Consult or share information with co-workers and supervisors important to officer safety/debriefing of critical incidents.
268. Keep informed of areas of legal liability (personal, agency, county).
269. Provide sentencing/dispositional consultations to the judiciary on a specific probation case.
270. In the office or field, physically subdue *with* the help of others a resisting or fleeing probationer.
271. Handcuff a non-resisting person.
272. Handcuff a resisting person.
273. Put an actively resisting person in the seat of a car.
274. Using a lifting motion, assist someone from a prone position on the ground to his/her feet (such as handcuffed or moderately incapacitated person).
275. In the office or field, physically defend themselves (using hands, arms or feet) against an attacking probationer or other individual.
276. Drive a car as part of their probation officer duties (not commuting).

- 277. Run (such as to assist others in an emergency or to get to cover).
(Additional Information: Running is for a short distance, typically 35-50 yards).
- 278. Bend, extend and twist their body such as when searching probationers, vehicles and/or placing leg-cuffs or other restraints on a probationer.
- 279. Use hands and fingers to search, fingerprint, operate chemical agents or pull a trigger.
(Additional Information: For the majority job, the use of hands and fingers was determined to relate to the tasks of searching. The use of chemical agents and firearms was not identified as a core task for the majority of probation officers statewide. Similarly, fingerprinting was not identified as a core task.)
- 280. Perform CPR. (Additional Information: This typically is two person CPR.)
- 281. Walk up a flight of stairs.
- 282. Run quickly up a flight of stairs.
- 283. Carry objects weighing up to 25 pounds such as boxes of evidence, files, equipment.